

Storage Commander

User Manual

Version 4.5
Revised 4/15/2014



Welcome to Storage Commander

Welcome to Storage Commander, the most powerful and easiest-to-use self-storage management software available. Our software was developed exclusively for the self-storage industry, Storage Commander was designed using the latest Windows 32 and 64bit graphical operating system architecture, and incorporates many features not found in any other management program.

This manual will help you to quickly get started with Storage Commander. We strongly recommend that you start with Section 1, *Exploring Storage Commander*. This section will give you an overview of all of the individual functions, screens and parameters that affect the operations of Storage Commander.

Proceeding to Section 2, *Using Storage Commander*, will allow you to familiarize yourself with basic operations such as: move-in, move-out, adjustments, transfers, payments, as well as other standard operations self storage managers do on a day to day basis.

It is important to understand that even though these operations may be considered standard to all self storage facilities, not all stores operate exactly the same. For instance, some stores may charge rent on the first of the month, while others charge rent each month on the calendar day of the move-in (Anniversary date). Some stores prorate unused rent at move-out and some will only allow prorated refunds if the customer gave notice within a predetermined time frame. The list of operational differences used throughout the Self Storage industry is extensive and, while Storage Commander can be configured to meet the operational requirements of your store, we strongly recommend that you take the time to review Section 3, *Installation & Setup*, to verify that Storage Commander is configured correctly for your facility.

We're available to help you with any questions that you might have with using Storage Commander. Our software comes with 60 days free technical support that is available from 7:00am to 5:00pm Monday through Friday Pacific Standard Time. We also offer additional support at reasonable rates after the initial 60 days have expired.

If you have any ideas on how to improve Storage Commander, please call us. We are always happy to discuss new features with our customers.

Thank you,

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Table of Contents

1	INSTALLATION AND SETUP	2
1.1	INSTALLING STORAGE COMMANDER.....	2
1.2	STARTING STORAGE COMMANDER.....	2
1.3	FACILITY SETUP	2
1.3.1	Facility Information.....	3
1.3.2	Setting Logon and Security Access	3
1.3.3	Setting Up New Users	4
1.3.4	Assigning Access Levels.....	4
1.3.5	Duplicating A Users Security settings	4
1.3.6	Removing a User.....	4
1.3.7	Setting Adjustment Parameters.....	5
1.4	SETTING UP PAYMENT PLANS	5
1.5	SET UP DISCOUNT PLANS.....	8
1.5.1	Creating New Discounts:.....	8
1.5.2	Creating Automatic Expiring Discounts:.....	8
1.5.3	Editing Existing Discounts:	8
1.6	SET UP GENERAL PURPOSE FEES.....	9
1.6.1	Creating a Fee	9
1.6.2	Deleting a Fee from the system.....	10
1.6.3	Removing a Fee From An Active Customer's Account	10
1.6.4	Adding recurring fees to an active customers account	10
1.6.5	Creating A Security Deposit	10
1.6.6	Editing Existing Fee's:	10
1.7	SETUP LATE STATUS	11
1.7.1	Creating a New Late Step	11
1.7.2	Setting Fee Amount.....	13
1.7.3	Setting a Fee as a Recurring Fee.....	13
1.7.4	Setting Late Fees:	13
1.8	SETTING UP CREDIT CARDS	15
1.8.1	Settings:	15
1.9	SETTING UP ACH.....	16
1.9.1	Configuring the ACH option module:.....	16
1.10	INSURANCE SETUP.....	16
1.10.1	Setup Insurance Premiums	17
1.10.2	Edit / Remove a Premium	17
1.10.3	Edit / Remove Insurance Company.....	17
1.11	SETUP REQUIRED FIELDS.....	17
1.12	SETUP ADDITIONAL LOGON	17
1.13	SETUP MARKETING SURVEY	18
1.14	SETUP EMAIL.....	18

1.15	PRINTER SETUP	18
1.15.1	Setting printer copy count.....	19
1.16	SETUP CONTRACT / ACCOUNT NUMBERS	19
1.17	SETUP INVOICE / STATEMENT NUMBERS	19
1.18	SETTING STORAGE COMMANDER'S DATA PATH	20
1.19	SETUP CREDIT CARD & DRIVER LICENSE SCANNER.....	20
1.20	SETUP CHECK READER.....	20
1.21	SETUP BACKUP OPTIONS	20
1.22	SETUP END OF DAY	20
1.23	SETUP GATE INTERFACE.....	21
1.24	SETUP SITE MAP.....	21
1.25	SETUP MICROSOFT WORD NOTICES & DOCUMENTS	22
1.25.1	Setup Word based Late Notices	22
1.26	CREATE UNITS.....	23
1.26.1	Deleting Units.....	24
1.26.2	Renumbering Units	24
1.26.3	Create A New Unit Size	24
1.26.4	Changing a unite size.....	25
2	USING STORAGE COMMANDER.....	26
2.1	USING THE SITE MAP.....	26
2.2	USING THE TOOLBAR.....	27
2.3	MOVE-IN	27
2.3.1	Adding Photo ID During Move-In	28
2.3.2	Alternate Contact.....	28
2.3.3	Employer Contact	28
2.3.4	Move-In Notes and Alerts	29
2.3.5	Entering Marketing Survey Information.....	29
2.3.6	Billing Information	30
	Changing the Move In Date.....	30
	Changing the Rental Rate during a move-in	30
	Second Month Prorate	31
	Add Merchandise Sales During A Move-In	31
2.3.7	Renting Multiple Units.....	31
2.3.8	Renting Additional Units To An Existing Customer	32
2.4	RESERVING A UNIT	33
2.4.1	Move-In From Reserved Units.....	33
2.5	WAITING LIST	33
2.5.1	Adding Customers To The Waiting List.....	33
2.6	MOVE-OUT.....	34
2.6.1	Move-Out with Active Account Balance	35
2.6.2	Scheduled Move Out.....	35
2.6.3	Scheduling a Move-Out with advanced payment.....	35

2.6.4	<i>Scheduled Move-Out</i>	36
2.6.5	<i>Canceling a Scheduled Move-Out</i>	37
2.7	TRANSFERRING CUSTOMERS	37
2.8	MAKING A PAYMENT	38
2.8.1	<i>Taking A Partial Payment</i>	39
2.8.2	<i>Payment by Cash</i>	39
2.8.3	<i>Payment by Check</i>	39
	Using the Optional Check Reader.....	39
2.8.4	<i>Check Payment Using ACH</i>	40
2.8.5	<i>Pay by Credit Card</i>	40
	Using the Credit Card scanner	40
	Manually entering credit card information	40
2.9	REVERSING A PAYMENT.....	41
2.10	PROCESSING A RETURNED CHECK	41
2.11	CUSTOMER NOTES.....	42
	Creating & Editing Customer Notes	42
	Creating & Editing Alert Messages	43
	Customer Comments	43
	Creating And Editing Unit Notes.....	43
2.12	CUSTOMER INFORMATION TRACKING	44
2.13	END OF DAY PROCESSING	44
2.14	INVOICING	45
2.14.1	<i>Setting Auto Invoice Number</i>	45
2.14.2	<i>Printing and Emailing Invoices</i>	45
2.15	SCHEDULING AUCTIONS.....	46
2.15.1	<i>Viewing Scheduled Auctions</i>	46
2.15.2	<i>Scheduling A Customer For Auction</i>	46
2.15.3	<i>Removing a Customer From Auction</i>	46
2.16	USING THE CALENDAR.....	47
2.16.1	<i>Adding Reminders</i>	47
2.17	SELLING MERCHANDISE	48
2.18	CUSTOMER LIST	48
2.18.1	<i>Name Search</i>	48
2.18.2	<i>Customer Details</i>	49
2.19	TRANSACTION HISTORY	49
2.19.1	<i>Reprinting Notices & Receipts</i>	49
2.19.2	<i>Printing History Transcripts</i>	50
2.20	UNITS LIST	50
2.21	CLOSING REPORTS.....	50
2.22	PRORATE CALCULATOR.....	50
3	ADVANCED FUNCTIONS.....	51
3.1	BACKUP & RESTORE	51

3.1.1	Backup	51
3.1.2	Restore	51
3.2	PRINTING THE SITE-MAP	52
3.3	UNIT LOCATOR.....	52
3.4	ADJUSTING AN ACCOUNTS BALANCE	52
3.4.1	Driver License Reader	53
3.5	REVERSING A TRANSACTIONS.....	54
3.5.1	Reversing a transaction through a customer account.....	54
3.5.2	Reversing Non-Tenant Transactions.....	54
3.6	CHANGE A UNITS BILLING.....	54
3.7	RATE CHANGE.....	55
3.7.1	Rate Change Preview.....	57
3.8	E-MAIL ACTIVITIES CONTROL PANEL	57
3.8.1	Show E-Mail	57
3.8.2	View E-Mail Documents	57
3.8.3	Change E-Mail Address.....	57
3.8.4	Re-send an e-mail	57
3.9	UNIT MAINTENANCE	58
3.10	CHARGING A FEE.....	60
3.11	OTHER INCOME	60
3.12	LINKING UNITS.....	61
3.13	UNLINKING UNITS	61
4	FINGERPRINT SCANNER OPTION	63
4.1	FINGERPRINT SCANNER.....	63
4.1.1	Installing the Fingerprint Scanner Option.....	63
4.1.2	Registering Managers Fingerprints.....	63
4.1.3	Registering Customer Fingerprints	64
	Registering Fingerprints During Move-In	64
	Registering Fingerprints to an Existing Account.....	64
	Deleting Fingerprints from a Customers Account	64
4.1.4	Using The Fingerprint Scanner	65
4.1.5	Verifying Fingerprints	65
4.1.6	Customer Detail Report.....	66
5	CREATING & EDITING NOTICES	67
5.1	CREATING NOTICES USING MICROSOFT WORD.....	67
5.1.1	Using Merge Fields	67
5.2	CREATING NOTICES USING STORAGE COMMANDER'S LETTER EDITOR	69
5.2.1	Creating a New Notice.....	69
5.3	SET UP EXISTING CUSTOMERS	71
5.4	CUSTOMER INFO.....	72
5.4.1	Alternate Contact.....	72

5.4.2	<i>Employer Information</i>	73
5.4.3	<i>Customer Notes</i>	73
5.4.4	<i>Assigning Multiple Units to a Single Customer</i>	74
6	REPORTS	75
6.1	OVERVIEW.....	75
6.2	SELECTING REPORTS	75
6.3	ENTERING DATE RANGES	75
6.4	GRAY BARS	75
6.5	PREVIEW.....	75
6.6	EDITING NOTICES & LETTERS	76
6.7	REPORT GROUPS	76
6.7.1	<i>Creating a Report Group</i>	77
7	GETTING HELP	79
7.1	TECHNICAL SUPPORT	79
8	COMPUTER SYSTEM SPECIFICATIONS	82

1 Installation and Setup

1.1 INSTALLING STORAGE COMMANDER

To install Storage Commander, place the Storage Commander CD -ROM into the computers CD-ROM drive.

If your computers CD-ROM drive is set to automatically run CD-ROM programs, the install program for Storage Commander will automatically start. Follow the on-screen instructions to complete the installation.

If your computer's CD-ROM drive is not set to automatically run CD-ROM based programs, follow the steps below to install Storage Commander:

Click the Start button and choose Settings/Control Panel.

In the Control window, double-click the Add/Remove Programs icon.

For Windows Vista / Windows 7 users, the control panel is located in the Start menu.

From the “Add/Remove Programs Properties” dialog box, click on the **Install** button.

Insert the Storage Commander installation CD into the CD ROM drive and click on the **Next** button.

In the “Run Installation Program” dialog box, move the mouse pointer into the “Command line for installed program” and left click.

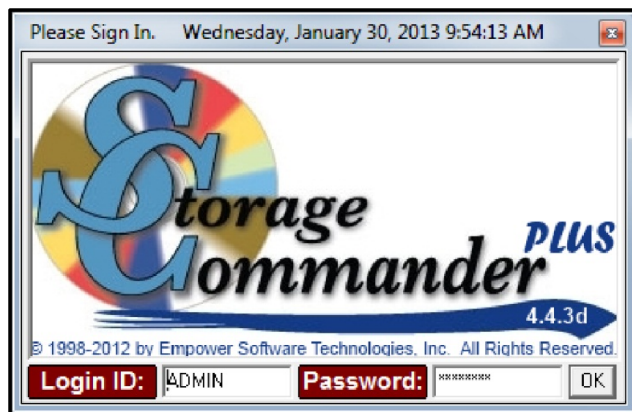
Type in the following: D:\startup.exe (where D: represents the drive letter of your CD ROM drive).

Click on the Storage Commander button to start the installation process. It is recommended that you use the default installation settings, unless you are an experienced computer user.

1.2 STARTING STORAGE COMMANDER

After the installation you will find a new Storage Commander icon on your Windows desktop, double clicking on the Storage Commander icon will launch the program.

The first screen displayed is the logon dialog:



The first time Storage Commander is run you must type in **ADMIN** as the login ID and **PASSWORD** as the password.

After you have logged in, you can open the Maintenance/Security pull down menus to assign unique id's and passwords as well as security access levels to your staff (see section “Setting Login & Password access”).

1.3 FACILITY SETUP

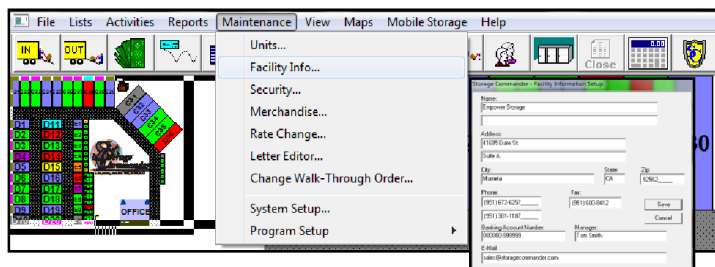
As with any management program, you will need to set up the operational parameters of Storage. If you purchased Facility Set-Up, most of the parameters needed to be in place prior to customer move in have already been entered into the system and you can skip to **Basic Operations**.

If Facility Setup has not been completed please continue with this section.

1.3.1 FACILITY INFORMATION

Storage Commander will automatically insert your storage facility's name and address on all reports and letters that are created within the system.

To install your facility's name and address into the Storage Commander system, follow the steps detailed below:



From the Storage Commander main screen select the **Maintenance** pull down menu and select **Facility Info**.

Storage Commander - Facility Information Setup

Name: Empower Storage

Address: 41695 Date St.
Suite A

City: Murrieta State: CA Zip: 92562

Phone: (951) 672-6257 Fax: (951) 800-8412

Banking Account Number: 000000-999999 Manager: Tom Smith

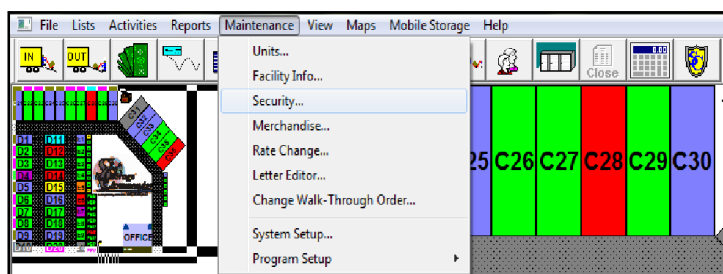
E-Mail: sales@storagecommander.com

Buttons: Save, Cancel

Fill in the address and phone numbers as you would like to see them printed on your reports and customer correspondence, as shown in the **Facility Information** dialog example below:

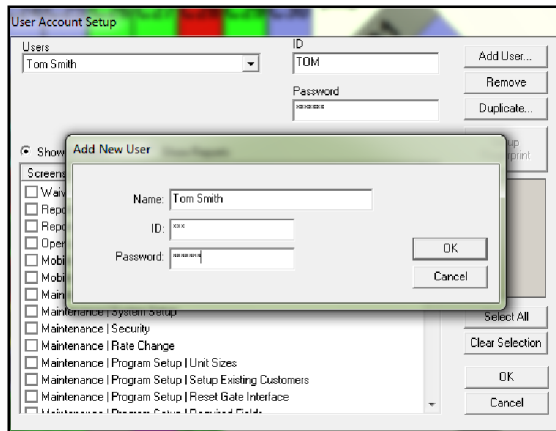
1.3.2 SETTING LOGON AND SECURITY ACCESS

In order to start Storage Commander, a valid ID and Password must be entered into the system. To set up a user ID and password, follow the steps shown below:



From the Storage Commander main screen, select the **Maintenance** pull down menu and click on **Security**.

1.3.3 SETTING UP NEW USERS

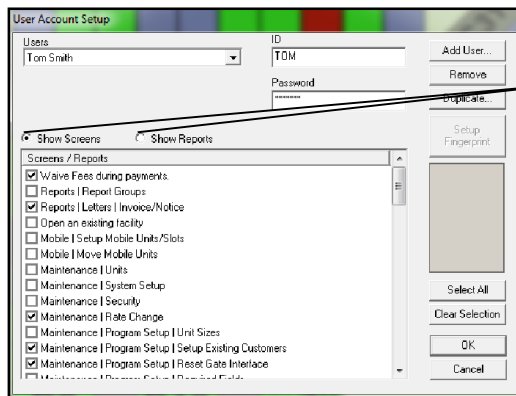


To set up a new user in Storage Commander you must create a unique ID and PASSWORD for the new user. This is accomplished by clicking on **Add User**. Enter the users Name, ID, and Password.

The ID will be recorded on all transactions made while this user is logged in to Storage Commander. We recommend you use an id that is recognizable, such as the first name or the initials of the employee, to make identification easier.

1.3.4 ASSIGNING ACCESS LEVELS

To set specific areas a user has access to while logged on to Storage Commander, click on **Maintenance/Security** from the Storage Commander main screen.



Select a user from the Users selection window by clicking on the Down arrow located to the right of the User window.

*Note that Storage Commander functions are split between Screens and Reports. Click on the button next to **Show Screens** or **Show Reports** to display the functions associated with the selected button.*

To give the user access to a specific function within Storage Commander, click on the check box next to the function; a check mark will appear in the check box indicating the user will have access to this function when they logon. To unselect a function from the list, position the mouse pointer on the function that has been previously selected and click using the left mouse button to remove the check mark.

Clicking on the Select All or Clear Selection buttons will select all/clear all functions within the current list.

1.3.5 DUPLICATING A USERS SECURITY SETTINGS

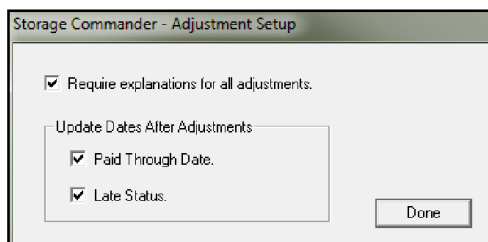
To duplicate the security of an existing user, click on the down arrow to the right of the **User** list box. Select the user that contains the security settings to be duplicated. Click on the **Duplicate** button, then enter the name, ID and password as discussed above.

1.3.6 REMOVING A USER

To remove an existing user, select the user by clicking on the down arrow next to the Users list box and click on the user to be removed. Once the user is highlighted, click on the **Remove** button.

1.3.7 SETTING ADJUSTMENT PARAMETERS

Account adjustments can be setup to require the user to enter an explanation for the adjustment prior to the adjustment being implemented. You can also setup adjustments to automatically update the accounts paid through and/or late status if rent and/or fee balances are adjusted.

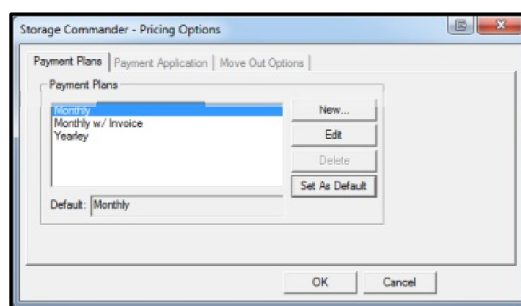
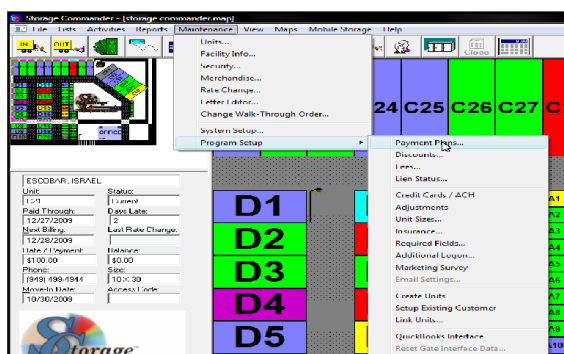


Note: Depending on how Payment Applications are set up, making adjustments to the rent and fee balances will have different effects on the automatic adjustment of the Late and Paid Through Date. See "Setting Up Payment Plans / Payment Application Tab" for more information on how this will affect adjustments.

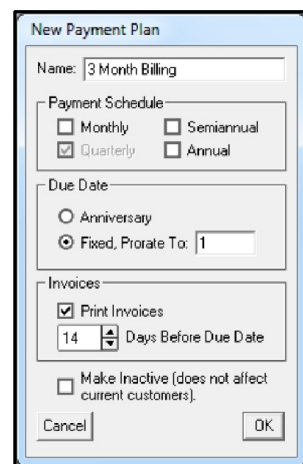
1.4 SETTING UP PAYMENT PLANS

You can setup numerous payment plans that give you control over billing periods and how the payments are applied. The monthly plan is predefined and you add additional plans as preferred.

To setup the Payment plans, go to the **Maintenance/Program Setup/Payment Plan** menu.



The **Payment Plans** selection screen lists all existing payment plans. You can select and edit an existing plan, or you can create a new payment plan. Payment plans that are no longer associated to any active customers can be deleted. You can also select an existing payment plan as the default plan for new move-in's.



When creating a **New** plan, or to **Edit** an existing one, the **Pricing Plan** dialog will appear:

The **Name** identifies the payment plan.

The **Payment Schedule** allows you to configure the payment plan to charge rent Monthly, Quarterly, Semiannually, or Annually.

The **Due Date** determines whether the customer is billed each month on calendar day of their move in (anniversary) , or a fixed billing day of the month, as entered in the **Prorate To** field. *In the example, this billing plan will charge rent on the 1st of each month.* You can create different billing plans to meet you customers requirements, such as billing plans that charge rent on the 15th of each month.

☒ Print Invoices

This option allows you to select if invoices are printed as part of the daily processing and also specify how many days prior to the billing date that the invoices should be printed. Note that printing the invoices earlier than the billing date does not cause the customer to be billed at the earlier date; they are still billed according to the billing cycle specified in the pricing plan.

The **Make Inactive** checkbox will keep a specific payment plan from appearing in the list of available plans during

move-in or transfer, but it will not affect active customers who are being billed to the selected plan. This feature allows you to stop offering a specific billing plan for new customer while continuing to honor the plan for customers who actively using the plan. *Note that you cannot delete a payment plan if any customers are being billed to the plan. You must first change the customer's billing option by using the **Activities/Change A Unit's Billing** menu, then you can delete the pricing plan from the list.*

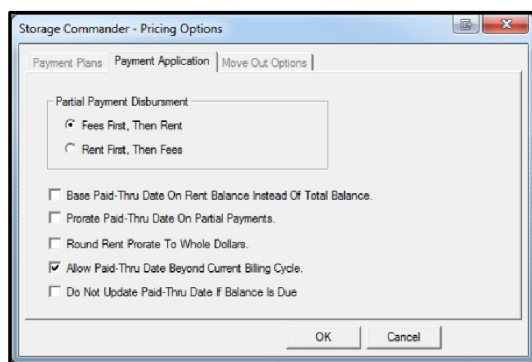
Payment Application Tab:

The **Payment Application** section of the **Payment Plan** dialog enables you to determine how a customer's payment is applied to their outstanding balance.

The payment application's options allow you to pre-set how a payment is applied toward an account and how payments affect the customer's paid-through date.

Partial Payment Disbursement

Clicking on one of three radio buttons in the section will set how partial payments are applied. The three selections are explained below:



☒ Fees First, Then Rent:

Selecting this option sets the system to apply 100% of the payment to any outstanding fees first. Afterwards, any money that remains will be applied to the outstanding rent. Selecting "Fees First, Then Rent" will prevent the customer from building up a fees balance while maintaining a current rent due balance.

☒ Rent First, Then Fees:

Selecting this option sets the system to apply 100% of the payment to any outstanding rent first and any money that remains will be applied to outstanding fees. This option allows the customer to pay off any outstanding rent but keep or continue to add to their fees balance.

☒ Base Paid-Thru Date On Rent Balance Instead Of Total Balance:

Placing a check mark on this option will advance the paid-through date when the rent balance is paid, *even if there is a fee balance*. If this option is not selected the Paid-Through date will not be advanced until **both** the Rent Balance & Fees Balance is paid. Bifocal

☒ Prorate Paid-Through Date On Partial Payments:

Placing a check mark on this option will allow the Paid-Through Date to be moved forward (x) number of days based on the daily rate (*x represents the number of days based on the daily rental rate divided by the sum of the rent payment. The daily rate is calculated by multiplying the monthly rental rate by 12 and dividing the result by 365*).

☒ Round Rent To Whole Dollars

Forces the rent balance to be rounded up to the next whole dollar (at .50¢), or down to the next whole dollar (at 49¢)

☒ Allow Paid Through Date beyond current billing cycle

Displays the paid through date based on the amount of a pre-payment (example: If a customer pre-pays 6 months rent, the Paid Through Date will show a date that is 6 months from the current billing date).

☒ Do Not Update Paid Through Date if Balance is Due

With this option selected, the customers paid through date will not be advanced if there is a balance due on rent or any fees.

Move Out Options Tab:

The screenshot shows the 'Storage Commander - Pricing Options' dialog box with the 'Move Out Options' tab selected. The 'Prorate Method' section has 'Daily Prorate' selected. The 'Schedule Move Out Notification' section has 'Generate Reminders During End-Of-Day' checked, with a value of 5 in the 'Days In Advance' field. The 'Refund Policy' section has 'Always Refund Pre-paid Amounts On Move-Out' selected. The 'Other Options' section has 'Charge for the day of the move out' and 'Print Statement On Move-Out' checked, with 'From Move-In Date' selected and 1 in the 'Copies' field. 'OK' and 'Cancel' buttons are at the bottom.

Move-Out Options Allows you to pre-set move-out policies that will be used when a facility manager moves a customer out of your storage facility.

Prorate Method

☉ Daily Prorate

Selecting this function allows Storage Commander to charge the customer for the number of days remaining in the current billing period, multiplied by the daily prorate

☉ Percent

Entering a percentage value will cause a refund to be assessed equal to the unit rental rate less the percentage value entered here, for all move outs.

Scheduled Move Out Notification

☉ Generate Reminders During End Of Day

Selecting this option allows Storage Commander to generate a reminder of a scheduled move-out “X” number of days prior to the scheduled move-out date. The reminder will be displayed in the reminder screen when Storage Commander is started up.

Refund Policy

The following settings will only apply to customers who have already paid for the month that they are moving out in (refund), or for customers that have not paid rent for the move-out (pro-rated rent payment). Storage Commander will always credit back pre-paid rent received for rental periods beyond the move-out month.

☉ Always Refund Pre-paid Amounts On Move-Out

Refunds remainder of rent based on Daily Prorate or Percent value.

☉ Don't Refund Payment On Move-Out If Greater Than X Days into Billing Period

Sets the number of days into a rental period that a customer would receive a rent refund.

☉ Don't Refund Payment On Move-Out If The Rent Balance Is Less Than “X”

sets the minimum balance for refunding to a customer.

Other Options

☉ Charge for the day of the move out

Selecting this option will cause Storage Commander to charge rent up to and including the day customers move out.

☉ Allow changes to the move out date

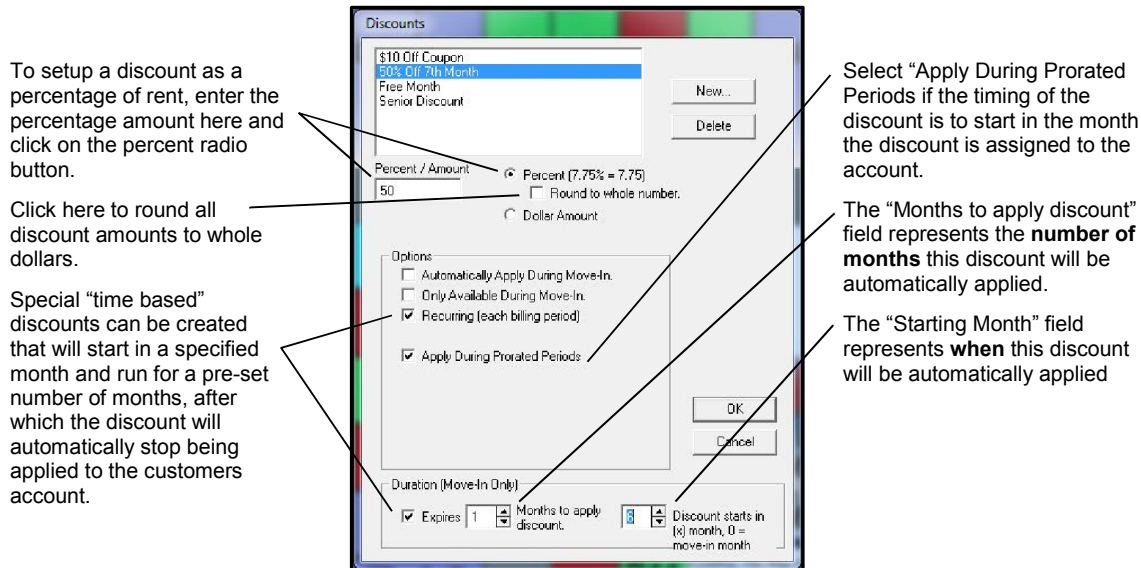
Allows user to adjust the move-out date at the time of the move out

Changing the date of the move-out will only adjust the prorated rent charge/credit based on the date entered into this field. The actual date of the move-out will still be recorded as the date the customer was moved-out in Storage Commander.

Print Statement On Move-Out Prints a statement of the customers account. This statement can cover all transactions from the customers move-in date (From Move-In Date), or allow the manager to enter a specific time range for the statement at the time of the move-out (**Prompt For Dates**).

1.5 SET UP DISCOUNT PLANS

You can setup various discounts, such as senior and military discounts, by selecting the **Maintenance/Program Setup/Discounts** menu. Once a discount has been created, it can be set up to be automatically added at move-in, or selected from a list during the move-in/payment process.



1.5.1 CREATING NEW DISCOUNTS:

Discounts can be created or removed from the system by clicking the **New** and **Delete** buttons, respectively. *Note; Discount that are currently active on customer's accounts cannot be deleted.* To delete a discount that is in use by active customers, you must first change the customer's billing option through **Activities/Change A Unit's Billing**. After the discount has been removed from all active customers, the discount can be deleted. This is the same place where you can add a recurring discount to a customer's billing plan once they have moved-in and have it applied to each billing period.

Discounts can either be applied as a percentage of rent or as a predefined dollar amount. For instance, you could have a 10% senior discount, or have a \$15 referral fee (or both!). With Storage Commander you can assign multiple discounts to a customers account as long as the combined total of the discounts does not exceed 100% of the rental rate.

1.5.2 CREATING AUTOMATIC EXPIRING DISCOUNTS:

Follow the same procedures as discussed in Creating New Discounts. After the discount's name and amount have been entered, place a check mark in the Recurring (each billing period) checkbox and another in the Expires checkbox. Enter the number of consecutive months the discount will be applied and how many months into the rental period the discount is to start (*Please note that if the discount is to be applied in the move-in month, and your facility uses fixed billing, the option "Apply During Prorated Periods" must also be selected*).

In the example shown in the dialog box above, customers who have the discount "25% Off First Two Months" added to their account would receive a 25% discount off their rent for the first two months beginning at move in. This discount will automatically stop being applied in the 3rd and all future months, even if the customer prepaays their account in the first and second months.

1.5.3 EDITING EXISTING DISCOUNTS:

From the **Maintenance/Program Setup/Discounts** menu, click on the discount to be modified. To remove a check mark from a previously selected discount parameter, click one time on the discount parameters description. To select a discount parameter click one time on its description.

1.6 SET UP GENERAL PURPOSE FEES

There are two types of fees that are supported by Storage Commander, **late fees**, which are created and managed through the Lien Status system (located under the **MAINTENANCE/PROGRAM SETUP/LIEN STATUS** pull down menus, and general purpose fees that are created and managed through the Fees system located under the **MAINTENANCE/PROGRAM SETUP/FEES** pull down menus.

In this section you will learn how to setup, maintain and use general purpose fees. To learn more about setting up and maintaining *Late Fees* please refer to Setting up and maintaining Late Steps referenced later in this manual

1.6.1 CREATING A FEE

You can setup various fees by selecting the **Maintenance/Program Setup/Fees** from the pull down menu bar located at the top of the Storage Commander main window:

You can add and delete fees from the list by clicking on the **New** or **Delete** buttons, respectively.

Note that you cannot delete a fee that is applied to an active customer.

Click on the **New** button and enter the name of the fee you are creating

Enter the amount of the fee charge in the **Percent / Amount** field, if the fee is a dollar amount select **Dollar Amount** or select **Percent** if the fee charge is based on a percentage of the rental charge.

Fees can be configured to meet a wide verity of uses, for example, the “**1.00 Invoice Fee**” referenced in the adjoining setup box is configured to charge an account each month (Recurring), apply itself on prorated months and full months (Apply During Prorated Periods), and not charge for months that are prepaid (Invoice. Apply only if rent is not prepaid).

An explanation of each Fee setup options is detailed below:

Percent / Amount: *Enter the amount of the fee in this box*

- ⦿ **Percent:** Select this option if the fee amount is to be calculated as a percent of the rental rate
- ☒ **Round to whole number:** Forces the rent balance to be rounded up to the next whole dollar (at .50¢), or down to the next whole dollar (at 49¢)
- ⦿ **Dollar Amount:** Select this option if the fee amount is to be calculated as a dollar amount.

- ☒ **Deposit Based On Unit Size** Select this option if the amount of the deposit is taken from the deposit amount entered for the unit size (see the section Create A New Unit Size for information on setting up deposits that will vary based on the size of the unit). **Note: Only use this configuration option in combination with a Deposit fee.**
- ☒ **Deposit (refund at move-out)** Selecting this option allows Storage Commander to charge a deposit (typically called a security or cleaning deposit) that will be refunded when the customer moves out of the unit.
- ☒ **Automatically Apply During Move-In** Select this option to have the fee automatically added to customers accounts at move-in.
- ☒ **Only Available During Move-In** Select this option if this fee only available during the move-in process.
- ☒ **Recurring (each billing period)** Selecting this option will cause the fee to be automatically charged to the account each time the unit is charged rent.
- ☒ **Apply During Prorated Periods** If you use 1st of the month billing selecting this parameter will calculate and charge the fee in the move-in month (which is almost always a prorated month). If this option is not selected the fee would only be applied to an account if the full billing cycle rent is charged.
- ☒ **Apply For Returned Checks** When selected, a returned check fee will be placed on a customers account whenever a returned check is processed against the account.
- ☒ **Apply During Unit Transfers** Selecting this option allows the associated fee to “travel” with the customers account on unit transfers.
- ☒ **Apply After Discounts** If a discount is setup as a percentage of rent, selecting this parameter will allow Storage

Commander to calculate the fee after the discount is applied. **Note:** *This option requires the fee to be configured as a percentage of rent.*

☒ **Apply as “Taxes”** Selecting this parameter allows Storage Commander to treat this fee as a tax and record all revenue generated by this fee as tax received which will be added to all appropriate financial reports.

☒ **Invoice. Apply only if rent is not prepaid** This fee option allows a fee to be charged to a unit only if the unit

1.6.2 DELETING A FEE FROM THE SYSTEM

Click on the fee to be deleted, this will highlight the fee, now click on the **Delete** button. Only fees that are *not* assigned to active customers can be deleted. Use the “Recurring Fees & Discount report to help identify fees that are currently attached to active customers (this report can be found under “**Reports / General / Recurring Fees & Discounts**”

1.6.3 REMOVING A FEE FROM AN ACTIVE CUSTOMER’S ACCOUNT

Removing a fee from an active customers account is accomplished through **Change A Units Billing**. To use this function you can either *right click* on the customers unit in the site map and select **Change Billing** or use the **Activities** pull down menu item and select “**Change A Unite Billing**” item from the list, and search for the customers unit/account. Either method will open the Change Billing configuration window and allow you to remove the fee from the customer account.

1.6.4 ADDING RECURRING FEES TO AN ACTIVE CUSTOMERS ACCOUNT

Adding a fee to an active customers account is accomplished through **Change A Units Billing**. To use this function you can either *right click* on the customers unit in the site map and select **Change Billing** or use the **Activities** pull down menu item and select “**Change A Unite Billing**” item from the list, and search for the customers unit/account. Either method will open the Change Billing configuration window and allow you to add a recurring fee to the customer account. Note: Use this function only if you are adding recurring fees (a fee that will be charged automatically each time rent is charged) to a customer account. If you need to charge a one-time fee (such as a lock cut fee) use the “**Charge A Fee**” function located in the “**Activities**” pull down menu.

1.6.5 CREATING A SECURITY DEPOSIT

Security deposits can be configured to be charged to a customer account in one of 3 ways;

- As a straight dollar amount charged at move-in and returned at move-out
- As a percentage of rent charged at move-in and returned at move-out
- Based on unit size, where the size of the unit depicts the amount charged at move-in for the security deposit.

If this option is selected, you will not need to enter an amount into the “**Percent / Amount**” field, as the amount of the deposit charged will be taken from the “**Deposit**” field located in the unit size database.

To add, change or delete a deposit from this area go to the **Maintenance** pull down menu item and select **Program Setup / Unit Sizes**, click on the unit size that you would like to modify and select **Edit**. In the “**Size Specific Values**” section enter the amount of the deposit in the **Deposit** field.

To setup a deposit fee within Storage Commander, follow the same procedures as with any other fee. Selecting the parameter “**Deposit (refund on move-out)**” will configure Storage Commander to refund the amount of the fee to the customer when they move out. *The deposit can be rescinded at move out if the customer did not qualify for the refunded deposit.*

1.6.6 EDITING EXISTING FEE’S:

From the: **Maintenance / Program Setup / Fees** menu, click on the fee to be modified.

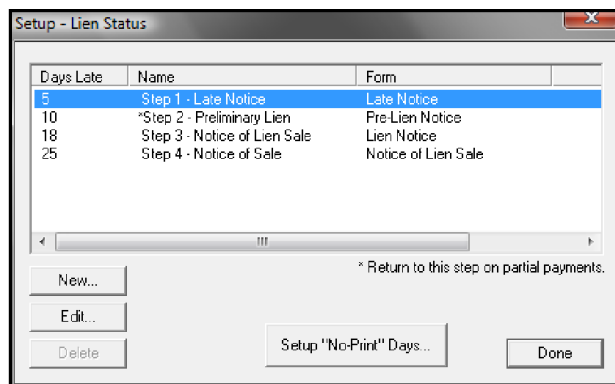
To remove a check mark from a previously selected fee parameter, click one time on the fee parameters description.

To select a new fee parameter click one time on its description, a check mark will automatically be placed next to the item.

1.7 SETUP LATE STATUS

The **Late Status** setup is used to specify the various stages that will be executed if a customer is late on payment of rent. Selecting **Maintenance/Program Setup/Lien Status** menu will open the Setup - Lien Status window where you will see all of the late steps currently in use at your facility. The list is organized into three columns, the first column displays the number of days late a tenant is given before they enter into a late status. Storage Commander calculates all late steps from the tenants paid through date. The second column displays the name of the late step which is used in the reports contained in Storage Commander. The third column identifies the name of the notice associated with the late step. Storage Commander can utilize internal notices produced by the Crystal Reports engine, or you can use customized notices using Microsoft Word 2010 or newer, using merge codes to bring specific tenant, unit & financial information into a notice.

Refer to the section "Creating Notices Using Microsoft Word" for detailed instruction on how to use this function.



1.7.1 CREATING A NEW LATE STEP

This section will walk you through the process of setting up late steps that will conform to the late payment policies that you have established for your facility. A detailed explanation of each field used in setting up late steps is listed below.

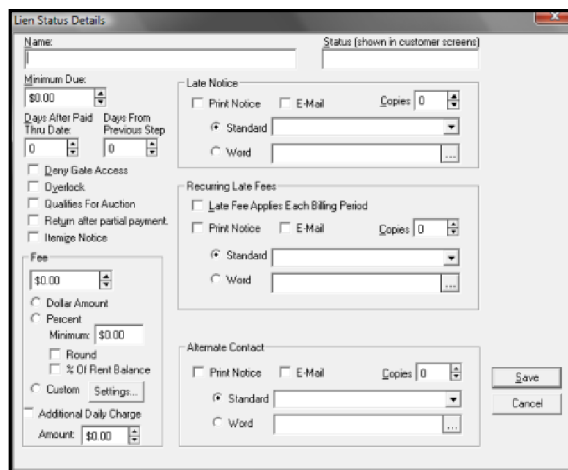
Name

Type a name to describe the late step in the **Name** field.

Status

Enter a short name in the **Status** field; this will appear in status summaries used in the program

Important Note: A status name must be entered and it must be unique to each late step (the same status name cannot be used with other late steps) Once a status name has been entered, it should not be changed.



Late Notice

Click on the Print and/or Email check box and select the number of copies if you would like to have late notices automatically printed or emailed when customers enter this late step.

Standard / Word	Select the type of notice that will be automatically generated during the end-of-day processing for this late step. The standard notice generates a notice that is from within Storage Commander; the Word notice is also automatically generated within Storage Commander but uses a Word document that you created. <i>Please refer to the section “Creating and Editing Notices” for more information.</i>
Recurring Late Fees	<p>Late Fee Applies Each Billing Period Place a check mark in the “Late Fee Applies Each Billing Period” check box to automatically apply this late fee each billing cycle.</p> <p>Send notice to customer. Placing a check mark here allows you to select a special notice to be sent when a recurring fee is assessed to a customers account. As with other notices you can select the notice to be generated through Storage Commanders native mode or via a Microsoft Word document.</p>
Alternate Contact:	<p>Send Copy To Alternate Contact Selecting this option will cause Storage Commander to generate a notice to the alternate contact. Once again the notice can be generated using Storage Commander native mode or via a Microsoft Word document.</p>
Minimum Due	This field sets the minimum level owed by the customer before the delinquency notice is generated, even if the customer is overdue.
Days After Paid Thru Date	Enter the number of days late that a customer must be to enter this delinquency stage. For example: If a customer is to be charged a late fee if payment is not received within 10 days of their <i>Paid-Through</i> date, enter 10 in the “ Days After Due Date ” box.
Days From Previous Step	Enter the number of days since the customer entered the previous lien step that is required for the customer to enter this step. For example: If a customer is in the lien step and makes a payment that puts them back into the pre-lien step, this setting will determine how long they have to be in the pre-lien step before they can go to the lien step again.
Deny Gate Access	Placing a check mark in the Deny Gate Access box instructs Storage Commander to send a lockout command to the gate controller when a customer enters this late step. Affected units will turn YELLOW when entering this late step.
Overlock	Selecting this option identifies all customers entering this late step as being ready for their units to be overlocked. Affected units will also turn RED on the site map when entering this late step.
Qualifies For Auction	Selecting this option identifies all customers entering this late step as being qualified to be setup for auction. The Auction Scheduler (see Scheduled Auctions) will list all customers in this late step for auction and allow you to set their auction date.
Return After Partial Payment	Selecting this option identifies this late step as the step for restarting the lien process when a customer makes a partial payment.

1.7.2 SETTING FEE AMOUNT

Enter the amount of the Fee associated with this late step here. The fee can be either a straight dollar amount, a percentage of the unit rate or a percentage of the rental balance. *Note, if you select the fee to be a percentage of the units rental rate or rent balance, and you want to round all fees to the nearest dollar, place a check mark in the Round box, you can also set a minimum fee assessment to be charged by entering the minimum fee due in the "Minimum" field.*

Custom Selecting "Custom" in the Fee setup area allows the assessment of the fee to be based on the value entered in the fee field of the unit size table (select Based On Unit Size) or from a table listing a range of rent owed. The State of California has adopted policies that regulate how much a customer has to pay in fees based on the amount of past due rent owed. Storage Commander allows you to comply with these guidelines (or guidelines used in other states) by configuring the fee charged based on the table shown.

To set up a new fee schedule or to edit an existing schedule: place a check mark in the Custom check box, this will enable the "Settings" button. Click on the settings button to open the "Custom Late Charge" dialog box. Click on "New" if you are creating or adding a new schedule range or click on an existing schedule range and select Edit to modify the range of rent due or fee amount associated with that range. This will open the "Late Fee Item" dialog box. In the example below a fee of \$10.00 will be assessed if the customers owes from \$0.00 to \$60.00 in past due rent, \$15.00 will be assessed if the customer owes from \$61.00 to \$100.00, and so on. By selecting percent, you can set the fee charged as a percentage of rent rather than a straight dollar amount with a minimum fee charge.

Additional Daily Fees

This feature allows Storage Commander to assess an additional daily fee against the customers fee balance. This daily fee will continue to be charged until the balance is removed from this late step, either by paying their bill or by proceeding into the next late step.

1.7.3 SETTING A FEE AS A RECURRING FEE

Once a fee has been created, you can configure the fee as a recurring fee (a fee that will automatically be applied to a customers account each billing period for as long as the customer remains in a late status).

It is recommended that recurring late fees are only applied to late steps that are not affiliated with the lien process. Check your local and state laws regarding assignment of late fees while in the lien process.

To set a late fee as a recurring fee, place a check mark in the box "Late Fee Applies Each Billing Period". You can also have Storage Commander generate a late notice that is only printed when this recurring late fee is applied to a customers account.

1.7.4 SETTING LATE FEES:

This section allows you to assign a fee to this delinquency step, and how the fee will be applied.

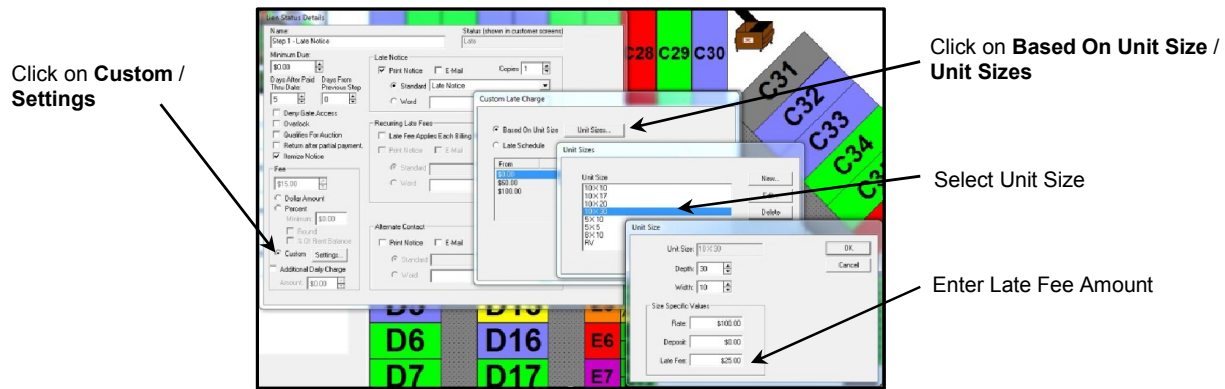
The **Fee** section sets the amount that will be charged.

Enter the amount that will be charged for this late step. Select if the late fee is a straight **Dollar Amount** or a **Percent** of rent.

Entering a number in the **Minimum** box will allow Storage Commander to assess a minimum charge against this late step if the percentage amount is less than the minimum amount.

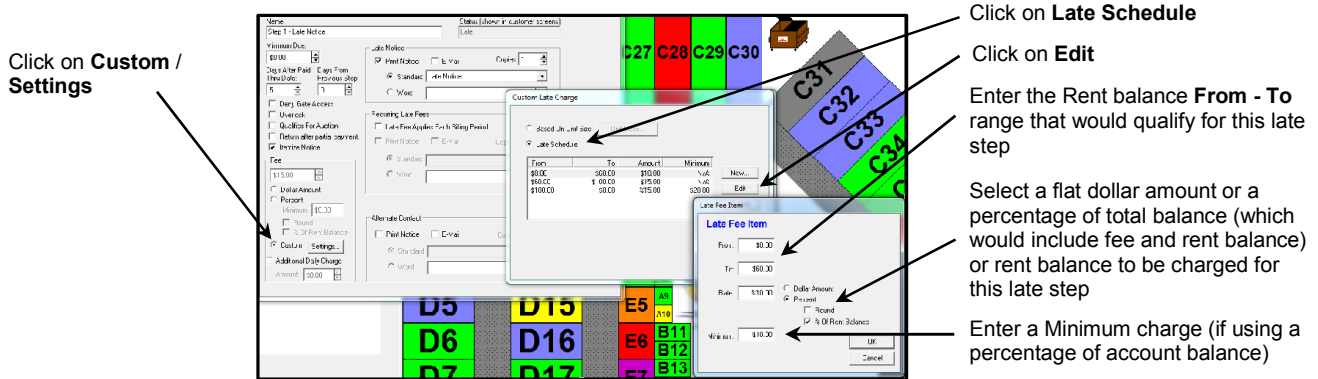
Placing a check mark in the **Additional Daily Charge** check box, and entering a value in the Amount box, will cause Storage Commander to charge the customer each day they are late.

Selecting **Custom / Settings** allows late fees to be calculated based on unit size or from a customizable table.



To set late fees based on unit sizes, select **Based On Unit Size** and click on the **Unit Sizes** button bar. Select the unit size from the list and click on the **Edit** button bar. Enter the late fee amount in the **Late Fee** box.

To setup a late fee table select **Late Schedule** and enter the rent balance parameters into the **From** and **To** columns



The **Deny Access** check box in the options section of the dialog allows you to specify whether gate access should be denied when a customer enters this step.

The **Late Fee Applies Each Billing Period** check box, when selected, will cause the customer to re-enter this step with all associated fees reassessed against the customer's account each billing period.

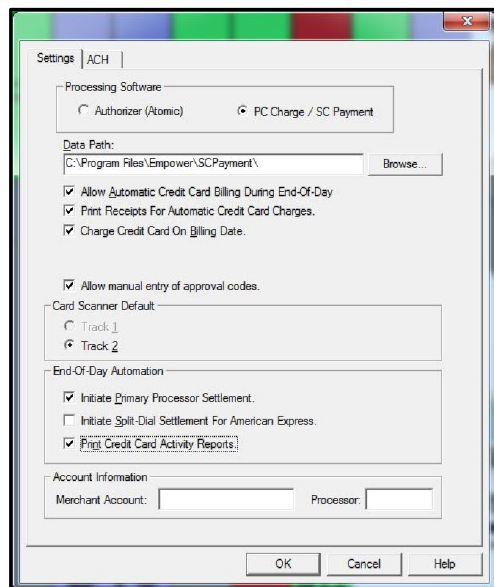
The **Notice To Send** field allows you to select a notice to be sent when a customer reaches this reoccurring step. To select a notice, click on the down arrow at the end of the **Notice To Send** text box and select the appropriate notice (selecting the blank field will not attach a notice to this step. Click on the up/down arrows to set the number of copies to be printed.

Repeat the procedures described in the previous paragraph to send a notice to the alternate contact.

1.8 SETTING UP CREDIT CARDS

To setup the credit cards that your facility will accept for payment, select the **Maintenance|Program Setup|Credit Cards** menu to display the following dialog:

1.8.1 SETTINGS:



- ☒ **Data Path:** Enter the system path of the credit card processing software installed in your system (PC Charge by Go Software will typically be located under *c:\Program File\Active-Charge*).
- ☒ **Allow Automatic Credit Card Billing During End-Of-Day:** Place a check mark here to enable this feature within the Storage Commander program.
- ☒ **Print Receipts For Automatic Credit Card Charges:** Place a check mark here to print a receipt of each credit card that was automatically billed.
- ☒ **Charge Credit Card On Billing Date:** Selecting this option causes Storage Commander to hold charging of credit cards until the actual day rent is assessed against a customers account.
- ☒ **Allow manual entry of approval codes:** Allows user to enter credit card approval codes recorded from a separate credit card processing terminal and manually enter them into Storage Commander

- ☒ **Initiate Primary Processor Settlement:** Causes Storage Commander to send the credit card batch to the processor during the End Of Day operation.
- ☒ **Initiate Split-Dial Settlement For American Express:** Selecting this option will cause Storage Commander to process all American Express credit card transaction directly with American Express, bypassing your normal credit card process service. Before selecting this option it is highly recommended that you check with your credit card process service first.
- ☒ **Print Credit Card Activity Reports:** Selecting this option will print credit card reports during End Of Day.

1.9 SETTING UP ACH

ACH processing allows you to electronically debit a customer's checking or savings accounts for rental payments. In addition, you can configure Storage Commander to automatically debit a customer's checking or savings account each time rent is charged.

1.9.1 CONFIGURING THE ACH OPTION MODULE:

From the Storage Commander main screen, select the **Maintenance** pull down menu item. Next select **Program Setup|Credit Cards|ACH**, (see Figure 1).

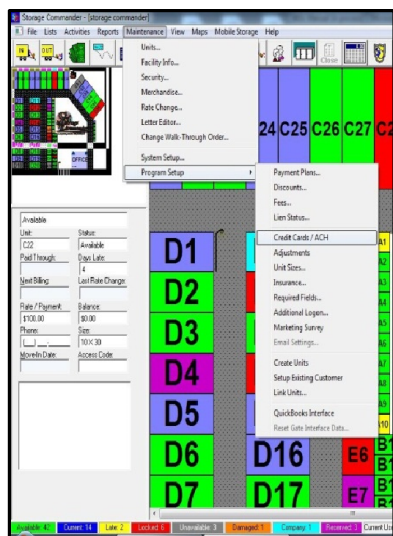


Figure 1

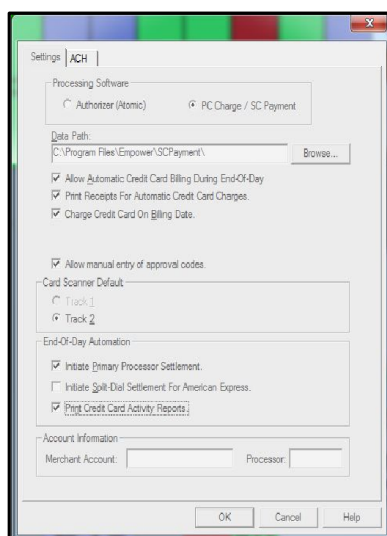


Figure 2

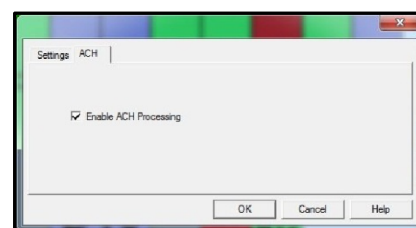


Figure 3

Enter the merchant account number and processor, given to you from PPI, in the fields identified in Figure 2. If you already have an active account with PPI you will not need to reenter them.

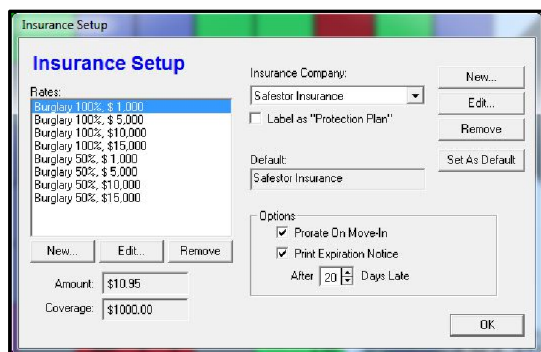
Click on the "ACH" tab to advance to the ACH activation screen (see Figure 3)

Click on the check box to enable ACH.

1.10 INSURANCE SETUP

Storage Commander comes pre-configured with SafeStore insurance which allows you to provide tenant insurance with just one phone call to activate your account. If you prefer to use another insurance company, follow the steps outlined in this section.

From the **Maintenance** pull down menu, select **Program Setup** and click on **Insurance** to open the **Insurance Setup** screen.



The Safestor insurance package and its associated policies will be displayed and set as the default insurance provider. To change this click on the **New** button and fill out the information for the insurance provider you intend to use. Once the insurance company, address and contact information has been saved, click on the **Set As Default** button to allow this insurance company to be available during a move-in. If your state does not allow storage facilities to sell insurance, place a check mark in the **Label as "Protection Plan"** box to record this as theft protection and not as insurance.

In the **Options** section you can set the insurance configuration to prorate the initial insurance cost of the insurance premium based on the number of days left in the move-in month (fixed billing plans only) or charge the full premium amount regardless of the move-in date. To set this up place a check mark in the **Prorate On Move-In** box to prorate the

based on the number of days left in the move-in month (fixed billing plans only) or charge the full premium amount regardless of the move-in date. To set this up place a check mark in the **Prorate On Move-In** box to prorate the

insurance charge during a move-in, or leave the box un-checked to charge the full amount.

To configure Storage Commander to print a notice informing the tenant that their insurance policy will be canceled due to lack of payment, place a check mark in the **Print Expiration Notice** box and enter the number of days a tenant must be late before the notice is generated.

1.10.1 SETUP INSURANCE PREMIUMS

Once the insurance company is created click on the **New** button located under the Rates list box. Enter the Premium name, Premium Coverage and the amount you will charge for this premium, when all fields are filled in click on the **OK** button to save the information and return to the Insurance Setup screen. Repeat this process for each premium offered by the insurance company.

Note: The information entered into the Premium Name field will appear as a description in the customer payment receipt.

1.10.2 EDIT / REMOVE A PREMIUM

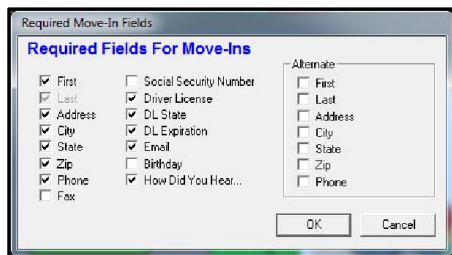
To edit or remove an insurance premium click on the premium in the Rates list box, after the premium is highlighted click on the **Edit** button to make changes to the premium or click on the **Remove** button to delete the premium.

1.10.3 EDIT / REMOVE INSURANCE COMPANY

To edit the insurance companies address and or contact information, click on the **Edit** button located next to the Insurance Company name field, this will open the Insurance Company address information screen where you can make the necessary changes. Click on the **OK** button to save the changes and close the window.

1.11 SETUP REQUIRED FIELDS

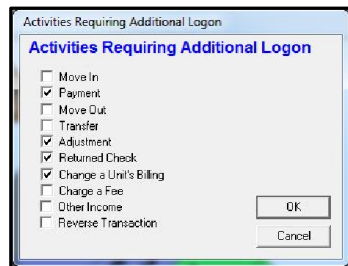
Storage Commander can be configured to require certain fields in the Customer Information and Alternate Contact



Information screens to be filled in during a move-in. To setup mandatory fields click on the **Maintenance** pull down menu and select **Program Setup**, click on **Required Fields** to open the **Required Move-In Fields** window. Select the data fields that you require to be filled in during a move-in.

1.12 SETUP ADDITIONAL LOGON

This function was designed to keep managers from entering transaction using another managers login id.

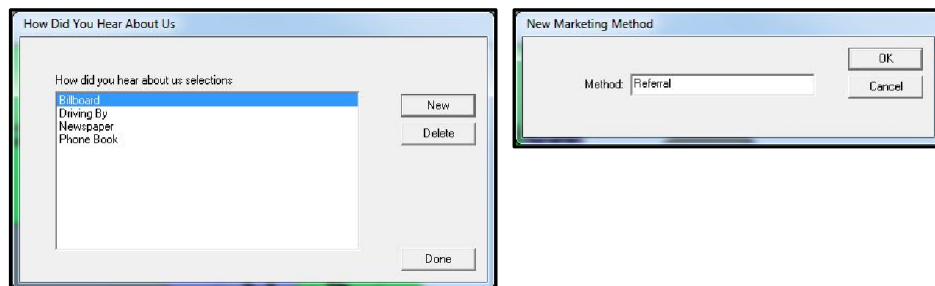


To configure Storage Commander to require all users to enter logon and password for specific transactions (like account adjustments, reverse transactions, or changing a customers billing options), open the **Maintenance** pull down menu and select **Program Setup**, click on **Additional Logon** to open the **Activities Requiring Additional Logon** window. Select the transaction types that will require a separate logon by the manager in order to complete the transaction

1.13 SETUP MARKETING SURVEY

To setup how your customers heard about your facility click on the **Maintenance** pull down menu and select **Marketing Survey**, to open the **How did you hear about us selections** window.

To enter a new description click on the **New** button to open the New Marketing Method screen and enter the description into the Method field. Click on **OK** to save the entry.

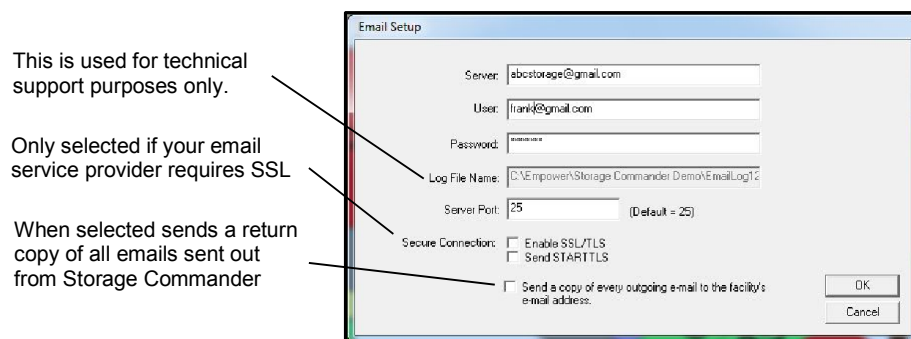


Use the Zip Code Marketing Report to view a statistical report covering customers who rented units based on these questions.

To locate the Zip Code Marketing report open the **Reports** pull down menu and select **Marketing / Zip Code Marketing**

1.14 SETUP EMAIL

To allow Storage Commander to send emails through your existing email account you must set the email configuration in Storage Commander to match your email account settings. If you are using Microsoft Outlook you can refer to the accounting settings in it.



1.15 PRINTER SETUP

Storage Commander can be configured to work with any printer that has been installed on your computer. To select a pre-installed printer open the **Maintenance / System Setup** drop down window. You will see three printer selection categories that are supported in Storage Commander; **Report Printer**, **Receipt Printer** & **Contract Printer**. An explanation of the purpose of each of these printer categories is as follows:

Report Printer..... Used for printing the various reports contained in Storage Commander.

Receipt Printer.... Used for printing payment transaction receipts.

Contract Printer.. Used for printing the Move-In contract.

To select a printer for a given category click on the **Select** button next to the associated printer category, this will open the Windows printer selection window. Click on the down arrow next to the printer name field and select the printer from the list of installed printers

Note: If the printer selection field is left blank, the associated printer category will use the Windows default printer.

To setup Storage Commander to use a receipt printer, you must first click on the Enable Receipt Printer check box prior to selecting the receipt printer. This allows Storage Commander to format the receipt to print within a 3 inch wide boundary.

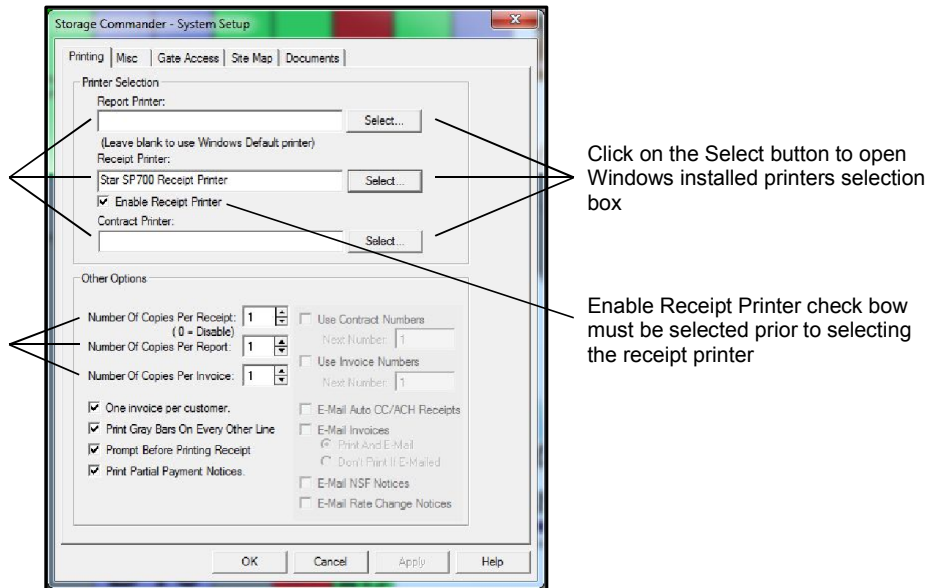
1.15.1 SETTING PRINTER COPY COUNT

To set the number of print copies to be generated for Receipts, Reports (individual reports, not report groups) and Invoices, enter the appropriate number of copies into the number field next to the desired print designation.

Once a printer has been selected the printer name will be displayed.

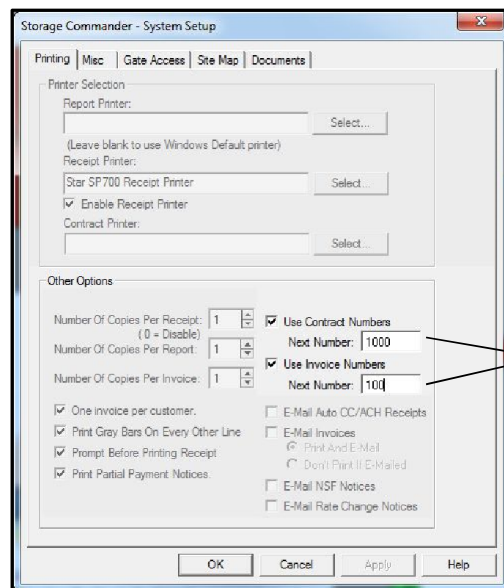
If the field is blank this print function will use the Windows default printer.

To set the number of copies that will be printed, enter the copy count hear.



1.16 SETUP CONTRACT / ACCOUNT NUMBERS

To have Storage Commander automatically assign contract / account numbers to the move-in contract, place a check mark in the Use Contract Numbers check box and enter the starting number of the first contract that will be printed from Storage Commander. This number will be automatically incremented on succeeding move-in contract.



A list of merge codes can be found in the Merge Code section of this manual.

1.17 SETUP INVOICE / STATEMENT NUMBERS

To have Storage Commander automatically assign invoice / statement numbers, place a check mark in the Use Invoice Numbers check box and enter the starting number of the first invoice / statement that will be printed from Storage Commander. This number will be automatically incremented on succeeding invoice / statement.

1.18 SETTING STORAGE COMMANDER'S DATA PATH

By default Storage Commander installs itself under the empower sub-directory of the boot drive. The default path would be: c:/empower.storage commander. You can change the location of where Storage Commander will read and write to its database files by clicking on the **Maintenance** pull down menu item and selecting **System Setup** and clicking on the **Misc** tab, and entering the location of the database files into **Data Path** field.

1.19 SETUP CREDIT CARD & DRIVER LICENSE SCANNER

To setup the optional credit card & driver license combo reader open the Storage Commander System Setup screen by clicking on the **Maintenance** pull down menu followed by the **System Setup** selection, now click on the **Misc** tab, click on the down arrow in the **Card Reader** section and select **MICR Wedge w/Card Reader**.

1.20 SETUP CHECK READER

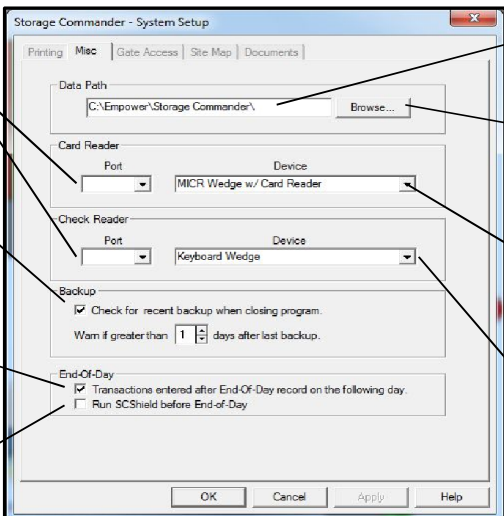
To setup the optional check reader open the Storage Commander System Setup screen by clicking on the **Maintenance** pull down menu followed by the **System Setup** selection, now click on the **Misc** tab, click on the down arrow in the **Check Reader** section and select **Keyboard Wedge**.

Com ports are no longer supported.
All devices use USB ports

To allow Storage Commander to remind you if you have missed making a back check this box and enter the number of days that will have been missed before a warning message is displayed during end of day.

Select this option (recommended) to allow transactions (such as payments) that are made after end of day has run to be recorded in the following days reports.

Select this option to allow SCSshield to automatically run prior to starting the end of day process.



The Data Path text field shows where data will be written to and read from (database location)

The Browse button will open Windows Explorer to help find the directory where Storage Commander database files are located.

Select MCR Wedge w/Card Reader to use the optional combo card reader & check scanner.

Select Keyboard Wedge to use the optional check scanner.

1.21 SETUP BACKUP OPTIONS

To configure Storage Commander's backup policies open the Storage Commander System Setup screen by clicking on the **Maintenance** pull down menu followed by the **System Setup** selection, now click on the **Misc** tab. If during the running of end of day you would like to be notified that Storage Commander has not been backed up, place a check mark in the **Check for recent backup when closing program**. You can also set the number of days that a backup has not been made before this warning is displayed by entering the appropriate number into the **Warn if greater than days after last backup** field.

1.22 SETUP END OF DAY

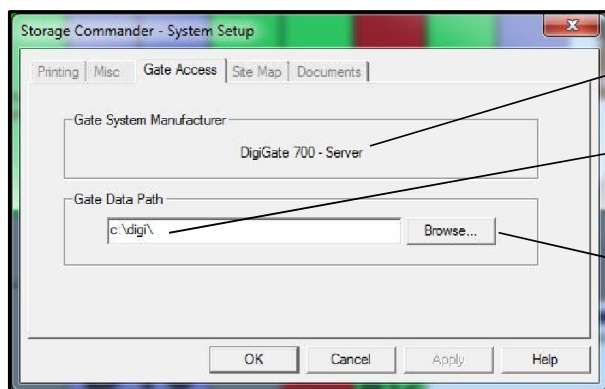
To configure Storage Commander's backup policies open the Storage Commander System Setup screen by clicking on the **Maintenance** pull down menu followed by the **System Setup** selection, now click on the **Misc** tab. To configure the end of day process to record payments that occur after the close of business (End Of Day) on the following days reports place a check mark into the **Transactions entered after End Of Day record on the following day** check box. If a transaction is entered after the daily reports have been produced (which occurs automatically during the end of day process) and you do not have this feature selected, those transactions will not be included in the reports until the end of week or end of month reports are generated.

1.23 SETUP GATE INTERFACE

Storage Commander supports virtually all gate security system available for the self storage industry. If you are in doubt as to our ability to interface with your existing gate system, or if you are looking at purchasing a new gate system, please call us at the number listed on the back page of this manual so that we can let you know if Storage Commander is compatible with the gates system you are using or intend to use.

When a new installation of Storage Commander is shipped the gate interface is pre-installed on the Storage Commander installation CD. If the gate interface is purchased after Storage Commander has been installed follow the instruction that were shipped with the gate installation CD.

If the gate interface is being installed on a network work station the **Gate Data Path** must be directed to the mapped drive of the computer containing the gate controller software (Refer to Network Installation referenced later in this manual for instruction on how to install Storage Commander to run on a network).



The **Gate System Manufacture** references the name of the gate system, and is automatically entered when the gate interface is installed.

The **Gate Data Path** determines where Storage Commander will send updated gate codes and lockout status information.

To change the location of the gate data path enter the new path here or use the Browse button to navigate to the new location.

1.24 SETUP SITE MAP

The Storage Commander site map can be configured to display different types of information when the mouse pointer is positioned over a unit, display the unit numbers at a 45 degree angle, as well as configure how the map is printed.

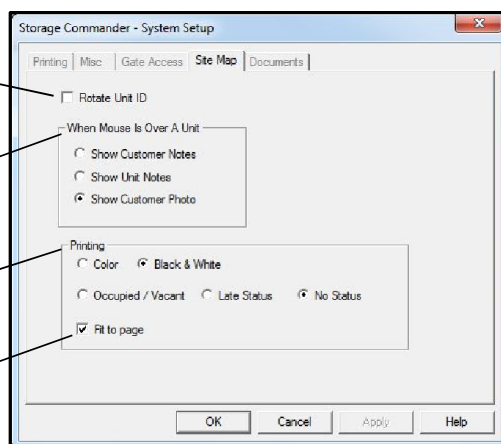
To change the setup configurations of the site map go to the **Maintenance** pull down menu followed by the **System Setup** selection, now click on the **Site Map** tab. This will open the site map configuration screen. Click on the settings that fit your needs.

Rotate Unit ID rotates all unit numbers on the map 45° counter clockwise.

Select what type of information to show in the Customer Information Panel on the site map

Configure the map to print in color and to show the status of the units in color or shades of gray.

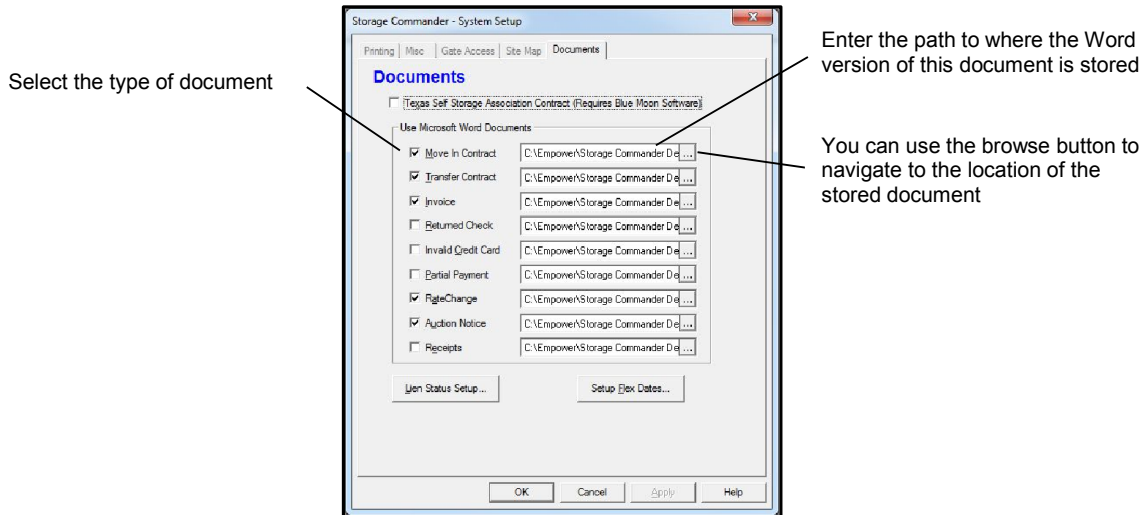
Automatically scale the map to fit to the size of paper in the printer.



1.25 SETUP MICROSOFT WORD NOTICES & DOCUMENTS

Storage Commander supports Microsoft Word 2010 allowing you to use the this word processor to create customized documents and notices that can be integrated into Storage Commander. The documents setup screen is where you assign the Word based documents to the various functions within Storage Commander which require a printed notice or document.

To assign a Word document to a print function click on the **Maintenance** pull down menu, select **System Setup** and click on the **Documents** tab to open the Documents setup screen



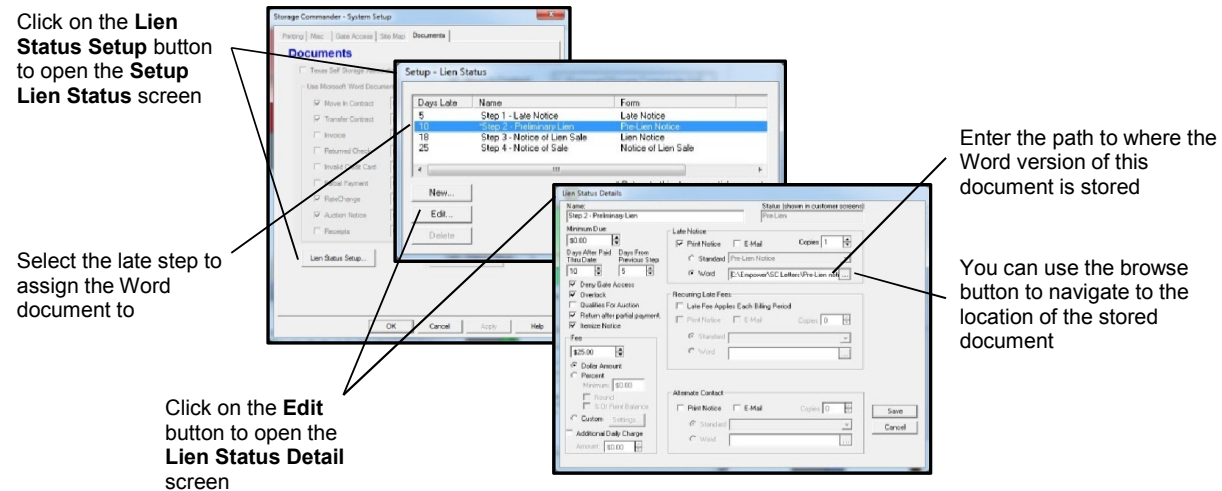
If you use the Blue Moon system to generate move-in and transfer contracts place a check mark in the Texas Self Storage Association Contract (Requires Blue Moon Software) check box.

NOTE: If this options is selected the Microsoft Word Document selection for Move-In & Transfer will be unavailable.

For detailed instruction on how to create a Word notice or document, refer to the section **Creating Notices Using Microsoft Word**.

1.25.1 SETUP WORD BASED LATE NOTICES

Assigning a Word notice to a pre-existing late step is accomplished in much the same manner as assigning a Word notice to any other printed document or notice, the only difference is navigating to the late step to where you will apply the Word version of the notice to. The figure below will help you with this process.



1.26 CREATE UNITS

Storage Commander allows you to add an individual unit, or to add a range of units with similar characteristics. To create new or add additional units within Storage Commander select **Maintenance|Program Setup|Create Units** from the pull down menu to display the following dialog:

Size

In the **Size** list box, click on the down arrow to select the Size of the unit(s) from the list

The **Size** pull-down list box lists the various sizes of units that have been.

Description

The Description field is a free form text field that is referenced in the Unit Maintenance configuration screen.

Rent

Enter the master default rental rate for this unit size into this field. This rental rate will be assigned to all new move-in's and will be the rate a unit will return to after a move-out.

Type

The Type field lists the types of storage spaces available, such as Storage Unit or RV Parking. This field is also available

Building

The **Building** field lists the buildings you've defined for the facility. The **Available Status** field is used to specify whether a unit is available for renting, already rented or unavailable (such as for maintenance or company use). The **Description** and **Location** fields are optional free-form text fields. The **Square Feet** field is automatically calculated but can be modified if needed and is used by the site map as well as by some of the summary reports. The **Walk Through** field is an optional field to specify the order that a unit should be checked relative to other units during a daily inspection. The **Overlocked** field is used to allow the manager to manually overlock a unit.

Unit Numbers.

A group of related units can be created at one time by using the fields in the **Unit Numbers...** group box. By using the **Prefix**, **Suffix**, **Starting Number** and **Ending Number** fields you can create a range of units with identical characteristics in a single operation. For example, to create a group of 10x10 units numbered A1cc through A20cc in Building A, you would enter values as shown in the example shown above, and click the **Create Units** button.

NOTE: Units that have been added will not show up on the site map. To show the new units on the Site-Map, run the site map editor program to insert and locate the new units into the map (refer to the Site Map Editor referenced later in this manual for instructions on this process).

1.26.1 DELETING UNITS

To delete units from Storage Commander, select the **Maintenance** pull down menu and select **Units** from the list to display the **Units Maintenance** dialog box:

Click on the **Units** menu item to select **Delete** or **Rename** unit

Click on the down arrow to open the unit list box and select the unit.

Select the unit to be deleted from the Unit Number text box. With the unit number highlighted click on the Units pull down menu and select Delete. Storage Commander will ask for conformation, select **YES** to complete the unit deletion or **NO** to cancel the operation.

NOTE: Only available units can be deleted. Units that have been deleted will be displayed on the site map as white units. To remove a unit from the site map you must use the Site Map Editor program to remove the unit from the map (refer to the Site Map Editor referenced later in this manual for instructions on this process).

1.26.2 RENUMBERING UNITS

To change a unit number, select the **Maintenance** pull down menu and select **Units** from the list to display the **Units Maintenance** dialog box:

Select the unit to be renumbered from the Unit Number text box. With the unit number highlighted click on the **Units** pull down menu and select **Rename**, the **Rename Item** box will open showing the Current Unit Id and the field where you will enter the New Unit Id.

After the new unit number has been entered, click on the OK button to complete the process.

SPECIAL NOTE: Only use this function to modify an existing unit number, **do not create** an entirely new number. If you need to create a new number use, **Create Units**. If the you are creating a new unit number for an occupied unit, create the unit first and then transfer the customer into that unit.

1.26.3 CREATE A NEW UNIT SIZE

From the **Maintenance|Program Setup|Unit Size** pull down menu select “New”.

Enter the size of the unit (such as 10 X 20) into the **Unit Size** box.

Enter the **Depth** and **Width** of the unit (such as 10 feet wide by 20 feet deep)

Enter a unit size **Description**. This description will be displayed in the Description column of the On-Line Reservation screen

Enter the standard rental rate into the **Rent** box.

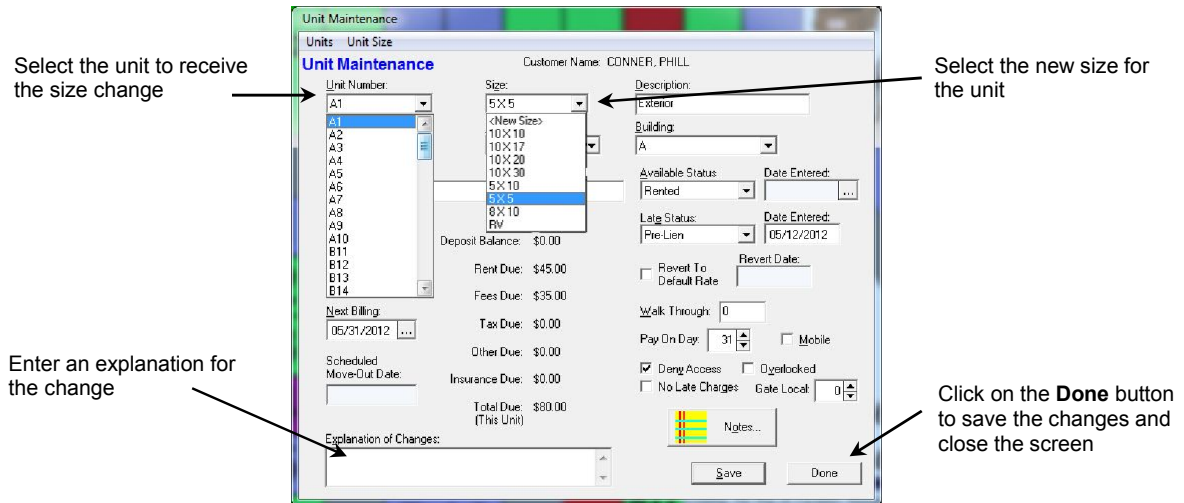
Enter a special **Deposit** and/or **Late Fee** only if you charge deposits and/or fees based on unit size.

Once the new unit size has been saved you can assign it to new units through the **Create Units** function, or you can assign it to existing units by opening the Maintenance pull down menu item and selecting Units and entering the unit number that you would like to

1.26.4 CHANGING A UNITE SIZE

Depending on what your intentions are, there are two different procedures that can be used for changing a unit sizes.

- 1.) If you intend to change all units of a certain size to a new size: From the pull down menu items at the top of the screen open the **Maintenance/Program Setup/ Unit Size** menu item and select the unit size you wish to change from the list of available unit sizes. From the Unit Size box change the values contained in the Depth and Width fields to reflect the new size
Note: Using this procedure will change all units that are associated with this unit size to the new size, and will be displayed on the site map at the new size.
- 2.) If you only need to change a single unit to a new size: From the pull down menu items at the top of the screen open the **Maintenance/ Units** menu item and select the unit that you will be changing the size on from the **Unit Number** list box. Once the unit is highlighted open the **Size** list box to select the new size of the unit.



Enter a note in the **Explanation of Changes** note field and click on the **Done** button to save the changes and close the session.

2 Using Storage Commander

2.1 USING THE SITE MAP

The Storage Commander site map is broken into four separate windows: **Satellite View**, which displays a graphical picture of the entire facility, **Working Window**, which displays a close up of all units that are captured inside the Satellite viewing rectangle, **Unit Information** window, which displays important information about the unit currently under the mouse pointer in the Working Window, and the map **Legend Bar** which displays 8 different legend colors depicting the status of units in the facility as well as the number of units in each status, and the manager who is currently logged in.

To use the site map move the mouse pointer inside the viewing rectangle of the Satellite View window. As the pointer moves inside the viewing rectangle it will change from an arrow to a hand icon. Click and hold down the left mouse button, the hand icon will now change to a clenched fist. With the left mouse button held down, move the mouse. As you move the mouse the facility graphic inside the Working Window will change to reflect the units now captured inside the Satellite View viewing rectangle. When the viewing rectangle has been positioned over the desired location release the left mouse button and move the mouse pointer into the Working Window.

As the mouse pointer passes over units in the Working Window, you will see the Unit Information window instantly updated to display general information of the unit. Double clicking with the *left mouse button* on a unit will initiate the payment process if the unit is occupied or a move-in if the unit is currently vacant. A single click with the *right mouse button* will open a selection box where you can select from a list of possible actions.

Double clicking on any of the colored legend segments will display a list of all customers or units that are represented in the associated segment (see sample of the "locked" legend below). Once a list is displayed you can click on a customer to open their ledger screens, or print the list.

Pull down menu items all access to all functions within Storage Commander

The Tool Bar provides quick access to operational functions of Storage Commander

Satellite View

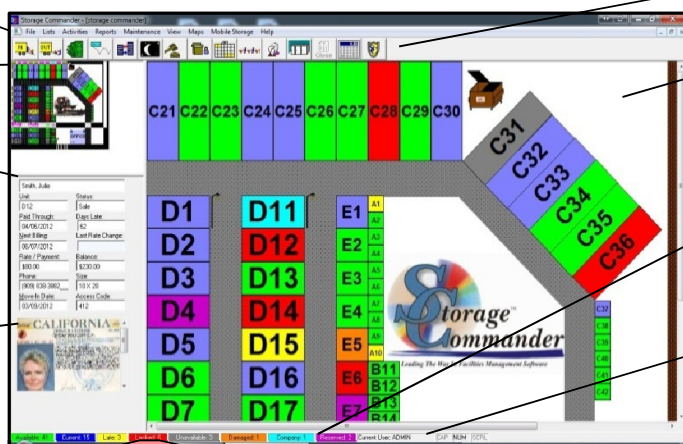
Click and hold the left mouse button down to move the viewing window.

Unit Information Box

Displays a comprehensive list of critical information for the customer referenced in the working window by the mouse pointer.

Photo ID, Customer Notes

Auto display customer ID or customer notes.



Working Window

Double click on a unit with the left mouse button to open the Move-In or Payment screen. Right click to display a selection list box.

Map legend

Click on a legend segment to display a list of customers/units represented in the segment.

Current User

Displays the ID of the current logged in manager

Locked Units

Name	Status	Unit	Balance	Phone	Move-In
JOHNSON, JUDY	Sale	C12	250.00	(858) 435-2852	04/03/2012
JUMPING, JUDY	Pre-Len	E6	115.00	(858) 383-8383	04/07/2012
GARCIA, JAMES	Sale	C14	150.00	(858) 389-8284	03/17/2012
FORRESTER, ...	Len	B17	130.00	(532) 948-5258	03/28/2012
FERRITI, TONI	Len	C36	115.00	(958) 980-5076	03/30/2012
Downey, Dave	Sale	C28	230.00	(858) 686-8562	03/29/2012

Details... Reserve Unit Print OK

Show inactive: Scan Forget

2.2 USING THE TOOLBAR



The Tool Bar provides easy access to many of the functions within the Storage Commander program. Using the tool bar you can perform the following functions:

	Move-In		Facility Calendar		Payment		Close a Report
	Move-Out		Waiting List		Customer List		End of Day
	Return Check		Unit List		Transfer		Prorate Calculator
	Schedule Auction		Sell Merchandise		Shield		

2.3 MOVE-IN

There are three ways to start the move-in process:

- Clicking on the **Activities** pull down menu item located at the top of the Storage Commander main screen, selecting **Move-In** from the list and selecting the unit from the unit list box.
- Clicking on the **Move-In** button in the **Tool Bar** and selecting the unit from the unit list box
- Double clicking on an available unit in the **Site Map**.

The first screen of the move-in process will be the **Customer Info** screen where you will enter in the name, address and other defining information of the customer. Fill in the appropriate customer information using the **TAB** key or the mouse to move from field to field. If the customer would like invoices / statements sent to a different address, select **Use A Different Billing Address** to open a new address screen where you will enter the appropriate billing address (this requires the customer to be in a billing plan that supports invoicing. See Setting Up Payment Plans for more information)

If a security gate system that supports Storage Commander is used at this facility click on the Access Control button to enter the access information and gate code.

If you have the optional card scanner and the customers driver license supports a magnetic strip on the back of the license, the customers name, address and driver license information can be entered by sliding the driver license through the card reader.

Move-In - Customer Info

Customer Information

* First: DARREN Middle: K.
 *Last(Business): SIMPSON
 Address: 48488 SO. CROSS
 City: TEMECULA
 State: CA Zip: 94849-9299
 *Phone: (951) 672-6257 Alt Phone: (951) 672-0001
 Fax: () - -
 Social Security: - - - Tax Id: - - - ☐ Tax Exempt
 Photo Id / DL: S391761 State: CA Exp Yr: 2016
 E-Mail: darrens@gmail.com
 Birthday: 10/10/1965
 How did you hear about us? Driving By

Unit List:

Unit	Size	Rent
D13	10 X 20	80.00
D8	10 X 20	80.00
D7	10 X 20	80.00
D6	10 X 20	80.00
D3	10 X 20	80.00
D2	10 X 20	80.00
C42	5 X 5	45.00
C41	5 X 5	45.00
C40	5 X 5	45.00

Buttons:

- Change unit list box to show Available or Reserved units** (points to the unit list box)
- Place a check mark here if invoices are to be sent or emailed to a different location** (points to the **Use A Different Billing Address** checkbox)
- Click here to open the Access Control setup screen** (points to the **Access Control** button)
- Select Scan Driver License to have the customers information automatically entered.** (points to the **Scan Driver License** button)
- Click on the Next button to proceed to the Photo ID screen (if this option was purchased) or to the Alternate Contact Information Screen** (points to the **Next >** button)
- Click on the Cancel button to terminate the move-in.** (points to the **Cancel** button)

2.3.1 ADDING PHOTO ID DURING MOVE-IN

If the optional Photo ID kit has been installed clicking on the Next button in the Customer Info screen will open the Photo screen where you will start the process of capturing an image of the customers driver license and/or importing a digital image into Storage Commander. Any number of digital photos can be attached to the customer account and easily accessed for visual verification.



After the customer information has been entered and the storage unit has been selected, clicking on the **Next** button will take you to the **Photo** dialog box. If you are going to take a picture of the customer's driver license, place the license in the photo id fixture and click on the **Get New Photo** button.

Enter the name of the customer and click on the **OK** button to display an image of the photo id, click on the **Capture** button to take a digital picture of the license, click on the **Transfer** button to transfer the picture into the Storage Commander database.

Click on **Close** to advance to the **Alternate Contact Information** screen.

2.3.2 ALTERNATE CONTACT

The **Alternate Contact Information** screen will appear after the identification photo has been processed (if this option was installed) or after the customer information screen was completed.

Fill in the alternate customer information using the same process as the customer information screen. Click on the **Next** button to proceed to the Employer Information screen

NOTE: If an alternate contact is not going to be used with this customer **DO NOT ENTER ANY INFORMATION INTO THIS SCREEN**. Information that is entered will be used as alternate address data in late notices as well as other documents.

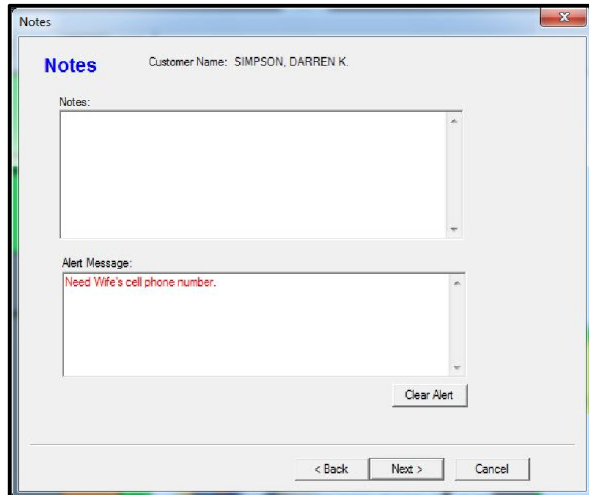
2.3.3 EMPLOYER CONTACT

Fill in the **Employer Contact** information screen using the same procedure as described above.

Click on the **Next** button to proceed to the **Notes / Alert Message** screen.

2.3.4 MOVE-IN NOTES AND ALERTS

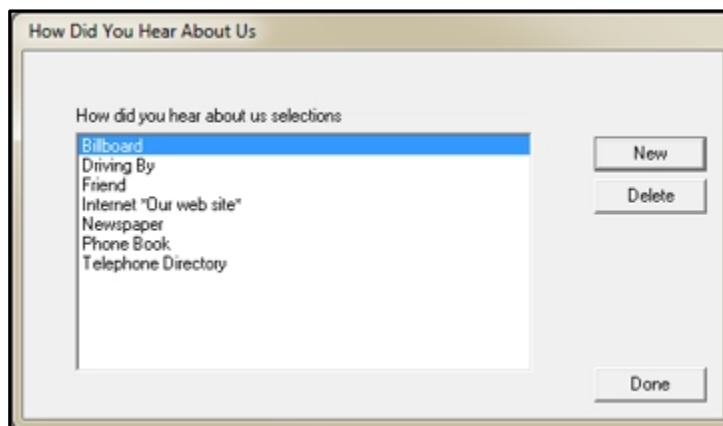
Use the Notes and Alert pads to enter any messages about the move-in. Information can be entered into the Note or Alert message pad by clicking in the appropriate message pad and entering the information. Any information that is entered into either area can be edited or removed at any time. In addition, any information entered into the Alert message pad will be displayed in an alert screen whenever the associated customer's account is opened.



Clicking on the **Next** button will open the **Billing Info** screen.

2.3.5 ENTERING MARKETING SURVEY INFORMATION

Click on **How did you hear about us** to open a list of pre-defined marketing questions that will help you determine how effective your marketing policies are.



Use the Zip Code Marketing reports to track new customers by this function.

2.3.6 BILLING INFORMATION

The Billing Info screen is used to setup the payment parameters for each unit being rented. From this screen you will select a billing plan, assign fees and/or discounts, sell insurance or merchandise, change the move-in date, or modify the rental rate.

* Requires security access to perform this function.

Selected Units
Selected Units box lists all units selected during move-in.

Rental Rate
The currently highlighted units rental rate can be changed for this customer by inserting a new rate here.

Payment Plan
Select payment plan here.

Fees/Discounts/Insurance
Add fees, discounts or rental Insurance by selecting them from these two list boxes. All selected fees and/or discounts will show here.

Second Month Prorate
Select to enable second month prorate at move-in.

Move In Date
Change the move-in date by entering the date into this field.

Full Payments
Enter the number of payments that are being made in addition to the current billing cycle.

Merchandise
Add merchandise sales

Table: Fees & Discounts / Insurance

Unit	Fee/Discount	Amount
02	Burglary 100% \$ 1,000	13.83
02	Senior Discount	-20.00
02	Admin Fee	5.00

Summary:
 Rental Rate: \$80.00 X Monthly Fixed = Extended Rate: \$80.00
 Prorated Amount: \$21.04
 Total Rent: \$101.04
 Discounts: (\$20.00)
 Rental Tax: \$0.00
 Fees: \$5.00
 Merchandise: \$0.00
 Insurance: \$13.83
Total Due: \$99.87

The payment plan is automatically set when you enter this screen (see Setting Up A Billing Plan), but can be changed by clicking on the down arrow in the Payment Plan field. Certain types of fees can also be configured to be automatically applied when you enter this screen (see Setting up Fees). Additional fees or discounts can be selected and applied to the move-in by clicking on the down arrow in the Fee & Discounts field and selecting the appropriate fee or discount from the list.

CHANGING THE MOVE IN DATE

Changing the move-in date has different effects depending on the billing plan.

If the move-in date is changed on a fixed billing plan (typically one that is set to charge rent on the 1st of each month) the prorated rent charge will change based on the modified move-in date. The actual move-in date that is recorded in the system will not change.

If the move-in date is changed on an anniversary billing plan (one that charges rent each month based on the calendar day of the move-in. With this type of billing plan changing the move-in date will still record the move-in based on the actual move-in date, but will charge rent for all succeeding months according to the date entered in the Move-In Date field.

CHANGING THE RENTAL RATE DURING A MOVE-IN

Changing the rental rate during the move-in process allows the manager to match the rate of a competitor. If the rate is changed warning screen is opened when leaving the Billing Info screen informing the user that the rate had been changed and requesting the duration the new rate will remain on the unit.

Warning: Unit Rate Changed

The rate for this unit does not match the default rate for its size. When do you want to revert back to the old rate?

Unit: 02

☐ Do not revert to default rate.

☒ Revert to default rate on: 07/01/2012

Buttons: OK, Cancel

If the new rate is fixed to not change to the street rate, select this option.

If the new rate is temporary and will revert to the street rate at a future time, select this option and enter the date that the temporary rate will return to the street rate.

SECOND MONTH PRORATE

Second Month Prorating charges a full months rent at move-in regardless of the actual date of the move-in, and will then charge a prorated rental amount in the second month. An example of this would be; a customer moves in on the 12th of the month, they would be charged for a full months rent at move-in, in the next month (2nd month) they would only be charge for the days between the 12th and the end of the month (prorated charge). This feature only works with billing plans that charge rent on the first of each month (fixed billing)

To apply 2nd month prorating during a move-in, select **Second Month Prorate** located in the **Billing Info** screen. Once selected, you will note that the amount charged in the **Prorate Amount** field is now \$0.00 while the amount in the **Total Rent** field is equal to a full month rent.

ADD MERCHANDISE SALES DURING A MOVE-IN

Adding merchandise sale (such as locks, boxes or tape) is accomplished by clicking on the Merchandise button in the Billing Info screen. Items sold during the move-in will be recorded in the customer account history.

2.3.7 RENTING MULTIPLE UNITS

To rent multiple units to the same customer during a move-in, select the additional units in the **Customer Info** screen by holding down the **Ctrl** key on the keyboard and clicking on the additional unit in the unit list box. As you click on units the selected unit will become highlighted indicating that the unit has been added to the move-in. As you progress to the **Billing Info** screen you will see the additional units listed in the **Selected Units** box with one of the units highlighted, adding or removing any discounts, fees, insurance or changing the rental rate will only be applied to the highlighted unit. To select another unit simply click on the unit in the Selected Units box.

Select an additional unit (or units) by holding the Ctrl key down and clicking on the desired unit(s) in the unit list box

Click on the unit to add any fees and/or discounts to the selected unit

2.3.8 RENTING ADDITIONAL UNITS TO AN EXISTING CUSTOMER

Renting one or more additional units to a customer who is already renting a space at your facility is done much the same way as renting a unit to a new customer. Selecting the additional unit from the site map, tool bar or from the Activities pull down menu is the same as discussed in the Move-In section referenced earlier in this chapter.

From the **Customer Info** screen click on the **Current Customer** button and select the customer that you will be adding a new unit to from the list. Proceed with the move-in.

Select an additional unit (or units) by holding the Ctrl key down and clicking on the desired unit(s) in the unit list box

Click on the Current Customers button to open a list box of current customers

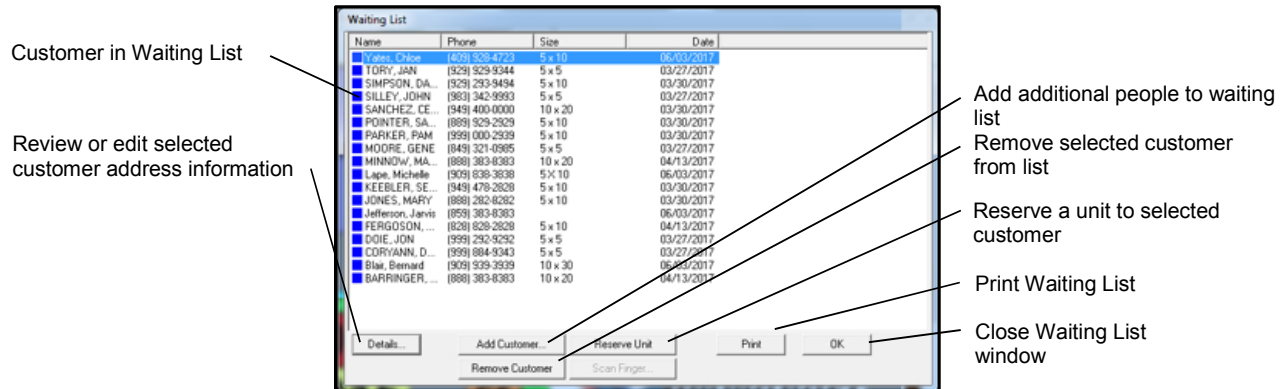
Select the customer from the list and click on the OK button to attach the existing customer to the unit

Name	Status	Unit	Balance	Phone	Move-In
CONNER, PHIL	Pie-Lien	A1	80.00	(956) 520-0002	03/01/2012
ELIAS, ERICKA	Late	A19	80.00	(956) 393-9394	05/12/2012
FORRESTER, ...	Pie-Lien	B17	100.00	(932) 948-5958	04/29/2012
ESCOBAR, IS...	Current	C21	0.00	(949) 499-4944	05/12/2012
JONES, JILLIAN	Current	C24	-80.00	(888) 252-2302	05/18/2012
ARCHER, AN...	Current	C25	0.00	(949) 499-9494	05/12/2012
Downey, Dave	Sale	C28	200.00	(565) 666-6562	04/18/2012
MENDEZ, JOY	Current	C30	0.00	(887) 773-7373	05/16/2012
REDDY, KAREN	Current	C32	0.00	(888) 252-9332	05/19/2012
HABINEIGHT, ...	Current	C33	0.00	(939) 966-4969	05/12/2012
FERRITI, TONI	Pie-Lien	C36	80.00	(999) 990-9076	04/29/2012
PHILLIPS, ST...	Current, Current	C37, D5	0.00	(884) 529-8759	05/13/2012, 05...
Burton, Shay	Current	D1	0.00	(212) 938-3888	05/23/2012
SIMPSON, DARREN	Current	D2	0.00	(956) 520-0002	05/12/2012
HART, ROSS	Current	D9	0.00	(884) 503-0030	04/16/2012
Smith, Julie	Sale	D12	230.00	(909) 838-3882	04/07/2012
GARCIA, JAMES	Sale	D14	150.00	(956) 399-9294	04/15/2012
Johnson, Sam	Pie-Lien	D15	115.00	(123) 123-1231	05/03/2012
Jackson, Alan	Current	D16	-80.00	(818) 383-8383	04/29/2012
WILLIOW, PRA...	Current	D19	0.00	(888) 829-6332	05/11/2012
AGUIRRE, SIL	Current	E1	0.00	(874) 747-4940	05/11/2012
JUMPING, JIJU	Pie-Lien	E6	115.00	(838) 383-8383	05/06/2012

2.4 RESERVING A UNIT

Placing a unit on hold (Reserved) causes Storage Commander to change the units color on the site map from Green (Vacant) to Purple (Reserved). You can take a reservation deposit at the time the unit is reserved which Storage Commander will credit back when the customer moves into the unit. Reserved units are tracked in the Unit Occupancy report but are not classified as rented units. A unit can be removed from a reserved status and all deposits returned to the customer, applied to other units or retained by the facility.

To place a customer into the unit reservation list go to the **Activities** pull down menu and select **Add To Waiting List** or click on the **Waiting List** button on the tool bar. From the waiting list screen click on the **Add Customer** button, fill in the customer information clicking on the Next button to move to the next screen. Click on the **Finish** button to complete the process and add the customer to the waiting list.



To reserve a unit for a customer in the waiting list, open the waiting list by clicking on the Waiting List button located in the toolbar. Locate and highlight the customer by clicking one time with the left mouse button on the customer's name. Once the customer is highlighted, left click on the Reserve Unit button located at the bottom of the Customer Waiting List dialog box.

Next select the unit to be reserved from the list of available units. Enter the rental deposit amount (if any) and click on the Finish button. If you entered a deposit amount you will be taken to the "Accept Payment" screen where you select how the customer paid the deposit (cash, check or credit card). Once the payment type has been selected, click on the Finish button to complete the reservation. If you did not take a reservation deposit clicking on finish will display a box asking if you would like to complete the reservation without a deposit, clicking on Yes will complete the reservation, whereas clicking on No will return you to the Reserve Unit screen

2.4.1 MOVE-IN FROM RESERVED UNITS

To move a customer in who has reserved a unit, either double click on the reserved unit in the site map or select the customer from the move-in button in the tool bar or from the Activities / Move-In pull down menu. All of the information that was entered into the system from the waiting list will be carried over to the unit being rented, if a reservation deposit was paid at the time of the reservation, the deposit amount will be credited from the rent due.

2.5 WAITING LIST

Adding potential customers to the waiting list provides you with a convenient location where you can enter a potential customer into the system who is looking for a specific type or size unit and would like to be notified when such a unit is available.

2.5.1 ADDING CUSTOMERS TO THE WAITING LIST

To add a customer to the waiting list, open the waiting list screen by clicking on the **Activities** pull down menu item and selecting **Add To Waiting List** from the menu items, or click on the Waiting List button in the too bar. From the waiting list screen click on the **Add Customer** button, fill in the customer information clicking on the Next button to move to the next screen. Click on the **Finish** button to complete the process and add the customer to the waiting list.

2.6 MOVE-OUT

Storage Commander allows many different move out options to be used depending on the status of the customer at the time of move out and how move outs are configured under “Payment Plans.”

Storage Commander can calculate move out refunds as a percentage of the base monthly rate, as a daily prorate, to always refund prepaid rent at move out or not refund any rent if move out is more than a preset number of days into a billing period.

Select the unit by clicking on an occupied unit in the site map using the right mouse button and selecting **Move Out** from the list or by clicking on the **Move Out** button in the tool bar and selecting the unit from the unit list box, and entering the unit number, the last name of the customer or the phone number into the **Search For** field. Once you have selected the unit, click on the **Next** Button to continue to the **Move-Out Billing Info** screen:

Set the Search parameter and enter the Unit #, Last Name' or Phone Number in the Search For box.

Unit	Size	Rent	Customer	Phone
A1	5 X 5	45.00	CONNER, PHILL	(858) 325-0302
C28	10 X 30	100.00	Desney, Dave	(951) 665-6562
A10	5 X 5	45.00	ELIAS, ERICKA	(951) 333-7094
C21	10 X 30	100.00	ESCOBAR, ISR...	(949) 499-4944
C36	10 X 30	100.00	FERRITI, TONI	(999) 090-9076
D19	10 X 20	80.00	FILLOW, FRANK	(888) 828-8282

If you choose to not use the site map for unit selection, you can click on the **Move-Out** button in the tool bar or click on the **Activities** pull down menu item and select **Move-Out** to open this screen for unit selection

The Move-Out Billing Info screen ties all of the move-out details together and lets you know what the cost or credit back to the customer will be.

The **Move-Out** date, is used to calculate the prorated rent and can be set to any date needed to achieve the desired move out amount. Set the **Move-Out Date** by entering a new date into the text portion of the edit field or by clicking on the ellipsis (...) button to use the on-screen calendar.

The **Past Due** section shows any balance owed prior to the move-out. The **Current Charges** section reflects the amount due based upon a prorated rent. Negative amounts indicate that a refund is due to the customer, and are shown in parentheses. If there are any additional discounts, fees, or merchandise that need to be added to the move-out amount due, click on the appropriate button.

Don't Prorate: Select this option if you *do not want* to apply the amount of rent credit to be given back to the customer based on the number of unused days left in the customers current billing

cycle. The formula used in this calculation is **Number of days left in current billing cycle x daily prorate**. To determine the daily rental rate you can use the prorate calculator or you can calculate it using this formula **Rental rate x 12 ÷ 365 = daily rental rate** (This is a security controlled option and may not be available to all users. Refer to the section “Set Up Payment Plans Move-Out Tab” discussed earlier in this manual)

If the actual amount being paid is different than the amount listed in the **Amount Received** box, enter the total amount being paid by the customer into the **Amount Received** field in the **Amount Paid** section. The amount to be distributed between rent, fees, rental tax and merchandise is calculated by the program, if the balance for rent, rental tax or fees needs to be changed, you will need to cancel the move-out and make an adjustment against the specific balance. Click on the **Next** button to continue to the “Accept Payment” screen:

Select the appropriate payment methods (as you do when taking a move-in payment) and click the **Finish** button to complete the move-out transaction and print a receipt.

2.6.1 MOVE-OUT WITH ACTIVE ACCOUNT BALANCE

To move a customer out that has a balance (either a balance due or a credit balance) on their account, go through the move-out process as you would with a normal move-out. From the **Billing Info** screen you will be able to remove any prorated rent credit (listed as a rent credit in the **Current Charges** column under Current Rent) by clicking on the **Don't Prorate** check box (*this is a security controlled option and may not be available to all users. Refer to the section "Set Up Payment Plans Move-Out Tab" discussed earlier in this manual*) to remove the prorated rent balance credit or balance due (if the customer has paid for a full month's rent and is moving out within that month), or if the customer had a rent balance and you have negotiated a reduction of the amount due, you can enter the amount of past due rent you have agreed to accept to complete the move-out.

2.6.2 SCHEDULED MOVE OUT

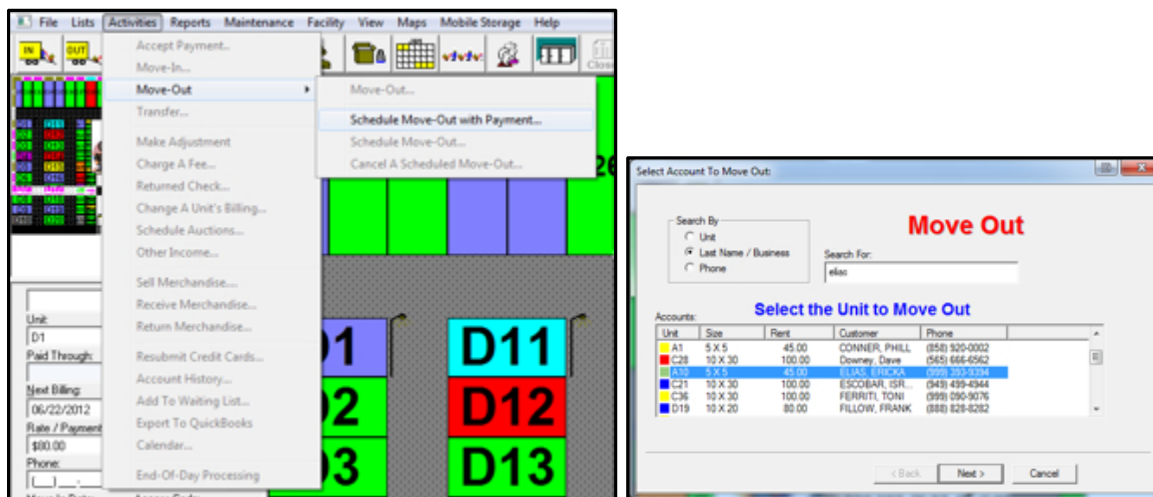
Scheduled move out differ from a normal move out in that the customer is not actually moved out of the unit at the time the scheduled move out is entered. Scheduled move outs allow you to set the date that the customer intends to move out and charge the customer prorated rent, based on the scheduled move out date. If the customer does not move out on the date scheduled they will be charged the remainder of the rent normally due. If the customer decides not to move out, they will return to the same billing period that they were in prior to the scheduled move out.

The Schedule Move-Out function allows the manager to accept payment for the prorated amount of rent that would be due based on the customers current paid through date and the date of the scheduled move-out.

The manager also has the option of entering a date for the scheduled move-out without accepting advanced payment. For this type of move-out refer to the next section **Scheduled Move-Out**.

2.6.3 SCHEDULING A MOVE-OUT WITH ADVANCED PAYMENT

Open the Activities pull down menu and select **Move-Out|Schedule Move-Out with Payment...**



Select the customer from the account selection box (You can perform a search to locate the customer by their last name, unit number, or phone number).

In the **Move Out-Billing Info** screen, enter the date of the move out.

The screenshot shows the 'Move Out - Billing Info' window with a callout pointing to the 'Move Out Date' field, stating 'Enter the scheduled move-out date here'. The window displays customer information, unit details, and a breakdown of charges. Below it is a 'Confirm Scheduled Move-Out' dialog box.

Move Out - Billing Info

Customer Name: Burton, Shay M
 Units: D1
 Payment Plan: Monthly
 Current Payment: \$80.00
 Paid Through: 07/09/2012
 Move Out Date: 07/27/2012
 Prorated Amount: \$47.34
☒ Scheduled Move Out

Past Due		Current Charges		Amount Paid	
Rent:	\$0.00	Current Rent:	\$47.34	Amount Received:	\$47.34
Rental Tax:	\$0.00	Rental Tax:	\$0.00	Merchandise:	\$0.00
Fees:	\$0.00	Discounts:	\$0.00	Rent:	\$47.34
Insurance:	\$0.00	Fees:	\$0.00	Rental Tax:	\$0.00
Other:	\$0.00	Merchandise:	\$0.00	Fees:	\$0.00
Total:	\$0.00	Deposits:	\$0.00	Balance:	\$0.00

Amount Due: \$47.34

☐ Don't Prorate

< Back Next > Cancel

Confirm Scheduled Move-Out

Customer Name: Burton, Shay M
 Unit: D1
 Move Out Date: 07/27/2012
 Prorated Amount: \$47.34

The customer will be charged the remainder of the normal rent if not moved out on the date scheduled.

OK Cancel

Once the move out date has been entered into the Move Out Date field, Storage Commander will automatically calculate the prorated rent for the move out. Click on the next button to proceed to the Accept Payment screen; Storage Commander will ask you to confirm the scheduled move out. Process the payment and click on **Finish** to complete the scheduled move out.

2.6.4 SCHEDULED MOVE-OUT

Open the **Activities** pull down menu and select **Move Out|Schedule Move-Out**

The screenshot shows the 'Activities' menu with 'Move-Out' selected, leading to the 'Schedule Move-Out' option. Below is the 'Select Unit(s) For Move-Out' dialog box.

Select Unit(s) For Move-Out

Unit	Name	Paid Through	Status	Unit Balance
D16	Jackson, Alan	07/16/2012	Rented	-60.00
D15	Johnson, Sam	06/18/2012	Pre-Len	115.00
D14	GARCIA, JAMES	06/03/2012	Sale	150.00
D12	Smith, Julie	06/23/2012	Sale	230.00
D9	HART, ROSS	07/26/2012	Rented	0.00
D5	PHILLIPS, STEVE	07/28/2012	Rented	0.00
D1	Burton, Shay	07/09/2012	Rented	0.00
C37	PHILLIPS, STEVE	07/28/2012	Rented	0.00
C36	FERRITI, TONI	06/13/2012	Pre-Len	80.00

Move Out Date: 07/27/2012

Schedule Unit(s)

Done

Select the customer by scrolling down the list of active customers or by entering the unit number.(additional units can be selected by holding down the **Ctrl** key while clicking on individual units in the Select Units box).

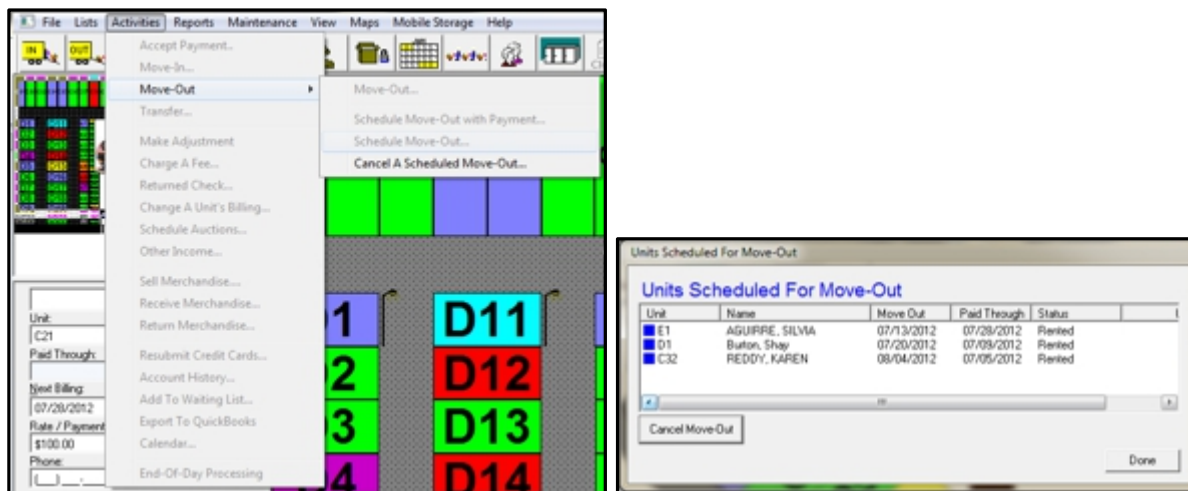
With the customer highlighted, enter the scheduled move-out date and click on the Schedule Unit(s) button.

Clicking on the OK button to complete the Scheduled Move-Out operation.

To view a list of scheduled move-outs, run the "Vacate Report" located in the **Reports** pull down menu under "Unit Reports" or open the calendar and select "**Scheduled Move-Outs**" from the events list.

2.6.5 CANCELING A SCHEDULED MOVE-OUT

Open the **Activities** pull down menu click on **Move-Out** and select **Cancel A Scheduled Move-Out** from the list.

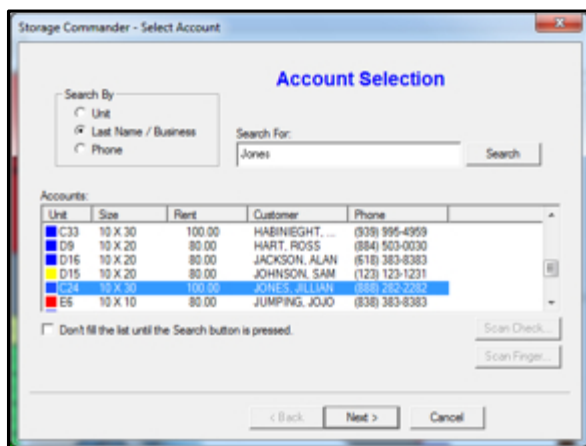


Select the customer from the Units Scheduled For Move-Out list, click on the **Cancel Move-Out** button to remove the customer from a scheduled move-out.

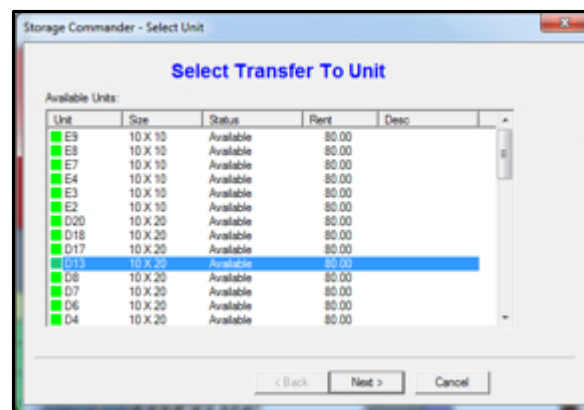
2.7 TRANSFERRING CUSTOMERS

To transfer a customer from one unit to another, **right** click on a unit from the **Site Map** and select **Transfer** from the selection list (*using this method will take you directly to the **Select Transfer To Unit**, bypassing the customer selection section*), select the transfer to unit and proceed with the transfer.

To transfer a customer using the toolbar or pull down menu, click on the **Transfer Unit** button on the **Toolbar** or select the **Activities/Transfer** menu to display the following dialog:



Select the customer by scrolling through the list and clicking on the customer's entry, or by selecting a **Search By** button and typing in the first few characters of the unit number or customer's last name. Once you've selected the customer, click on the **Next** button to continue to the **Select**



Transfer To Unit window.

Select the new unit to transfer the customer into by clicking on the unit's entry (first scrolling to it if necessary). Then click the **Next** button to continue to the Transfer Billing Info Screen

The transfer date defaults to the current date. If a different date is desired, then either type the date into the field or click on the display calendar (...) button to use the on-screen calendar. The transfer date is used to prorate both the rent on the **From Unit** and the rent on the **To Unit**.

Changing the transfer date will automatically adjust the Amount Due based on the number of days prior to (credit) or after (charge) the customers next bill date.

The top portion of the Transfer Billing Info box displays information about the transfer from and transfer to units.

Any past due balances that the customer owes will be listed in the Past Due column. These balances will be included in the transfer

View Discounts or Fees that are currently active on the account.

To add or remove discounts or fees from the account, you must close out of the transfer and go to Change Billing for this account

Click on Cust Details to view the account history of the customer.

The Balance section of the dialog shows any outstanding balance on the **From Unit**. The **Charges** section shows all credits and the prorated new unit rent balance in addition to any new fees, discounts, insurance premiums or merchandise charges. To view fees and/or discounts that are currently assigned to the account click on the Discounts or Fees buttons to open the Fees and Discounts list box. To add or remove a fee or discount must cancel the transfer and go to Change A Units Billing for the customer. Once the fee and/or discount has been added or removed you can complete the transfer.

Click the **Finish** button to complete the transfer.

2.8 MAKING A PAYMENT

There are three ways to accept payment for a rental unit: click on the **Accept Payment** button in the tool bar, click on the **Activities|Accept Payment** pull down menu and select the unit (customer) from the list or double click on the unit from the site map. Any one of the three ways listed above will open the **Billing Information** box where you set up the payment options.

Click on Wave Fee to bring up a list of all currently assessed fees, selecting a fee from this list entering an explanation and clicking on the Wave button will remove the fee from the account.

Click on the Cust Details button to view customer details such as: address and account history.

Enter the amount of payment if payment is not equal to amount due (such as a *Partial* payment or over payment).

Storage Commander will automatically adjust individual field balances based on the facility setup i.e. Rent first or Fees first, you can make changes to these balances through adjustments if necessary.

If Storage Commander has already charged rent on the unit the **Past Due** box will show the breakdown of all charges that have been assessed against the unit. The **# Payments** field will be set to 0 signifying that Storage Commander is configured to accept a payment for the past due amount only, and that the customer is not paying in advance for future rent (moving the **# Payments** counter up will allow you to take any number of pre-payments).

It is important to understand the relationship between Predicted Paid Through Date, Paid Through Date & Next billing date, as these three dates will provide you with a clear picture of the customer payment status after the payment is processed.

- The **Predicted PTD** field indicates how far the customer is paid in advance based on the number of payments entered in the # Prepayments field
- The **Paid Through** field indicates the customer current payment status

- The **Next Billing** field indicates the date will charged rent. Storage Commander always charges rent on a monthly cycle, it does not matter if the customer has or is making advanced payments the next billing cycle will be in the next month. If a customer pays in advance the Predicted Paid Through date will indicate how fare the customer is paid in advance. If an advanced payment is made it will be posted to the customers account as a rent credit when Storage Commander charges rent will apply the credit against the rent charge and advance the customers Paid Through date automatically.

2.8.1 TAKING A PARTIAL PAYMENT

To process a partial payment (a payment for less than the balance due), click on the Partial Payment button and enter the amount of the payment you are going to receive in the **Amount Received** field. Based on the payment setting that have been setup in Storage Commander, the payment will be automatically divided between the Rent Balance and Fees Balances. (typically Storage Commander is configured to apply a partial payment to any outstanding fees first, and than apply the remainder of the payment to the rent balance). Based on your Storage Commander configuration the customer may remain in their current late status, be reset to an earlier late status where thelien process will be restarted or have their paid through status mover forward based on the amount of the partial payment.

To learn more on how your facility is configured, go to the **Maintenance** pull down menu item (located at the top of the Storage Commander screen) and select **Program Setup** followed by **Payment Plans**, to review your Payment Plans, Payment application, Move-In & Move-Out options.

Click on the **Next** button to advance to the **Accept Payment** screen.

Click on the appropriate check box *cash, check or credit card* that corresponds to the payment being processed. The payment for the amount due will than appear in the associated payment field.

If the payment is split between two payment types, such as cash & check, select one of the payment types and enter the amount of the payment into its associated payment field. Next, select the other payment type; Storage Commander will automatically calculate the correct split and enter it into the payment field.

Note: If you enter a payment amount the is not equal to the amount shown in the **Amount Due** field, Storage Commander will display a message instructing you to return to the **Billing Info** screen (by clicking on the Back button at the bottom of the Accept Payment screen) and enter the actual amount being paid into the Amount Received field

Click on the **Finish** button to complete the payment.

2.8.2 PAYMENT BY CASH

As with all payment options (cash, check & credit card) the amount of the payment has already been calculated by Storage Commander and is referenced in the Amount Due field. All you need to do at this point is select Cash as the payment type, Storage Commander will automatically enter the amount of cash needed to complete the payment process. Click on the Finish button to complete the payment process and take you to the print receipt screen

2.8.3 PAYMENT BY CHECK

Click on the **Check** checkbox, verify that the amount that has been automatically entered into the payment box matches the amount of the check. If the amounts do not match click on the **Check** checkbox again to clear the payment box, click on the Back button to return to the Billing Information window. In the **Payment** column enter the amount of the check into the **Amount Received** field. If the amount you entered is less than the amount due and there has been a fee assessed against the account, Storage Commander will **automatically** split the payment between Rent and Fees according to the disbursement setup in *Payment Plans/Payment Application* section. If the amount of the check is more than the amount due, a credit will be applied to the customer account, which will be automatically applied to the amount. Click on the Finish button to complete the payment process and take you to the print receipt screen

USING THE OPTIONAL CHECK READER

If the optional check reader has been installed, Storage Commander will detect it and ask to Scan the Check when pay by check has been selected. To scan a check place the check into the check reader (Front side of the check toward the center of the reader) and gently push the check forward, when the check reader detects the check a motor will start up and automatically pull the check through the reader. As the check travels through the reader the

MICOR font located at the bottom is read and the data entered into the payment screen. The data that is read from the MICOR font is: routing number, account number and check number. Once a check has been registered to a customer account, selecting the payment option from the tool bar and scanning the check will automatically locate the customer account.

2.8.4 CHECK PAYMENT USING ACH:

From the Accept Payment screen, select **CHECK** as the payment type. When prompted, run the check through the check scanner; the check number, routing number and account numbers will automatically appear in the associated fields. Select **Savings** or **Checking** from *Account Type* and **Personal** or **Business** from *Account Class*. If the customer wishes to have their checking or savings account automatically debited for future rent, click on “**Auto Debit Future Rent**” to place a check mark in the box.

The screenshot shows the 'Accept Payment' dialog box with the following fields and options:

- Customer Name: CONNER, PHILL D.
- Amount Due: \$80.00
- Cash: \$0.00
- ☒ Check: \$80.00
- Check Number: 12345
- Bank Number: (empty)
- Routing Number: 12345678
- Account Number: 112345678
- Account Type: ☒ Checking
- Account Class: ☒ Personal
- Auto Debit Future Rent: ☐
- Process Using ACH:
- Scan Check:
- Update Card:
- Charge Card Now:
- Card Not Present:
- Scan Credit Card:
- Payment Balance: \$0.00
- Buttons: < Back, Finish, Cancel

Annotations on the left side:

- The payment amount will appear in the payment field
- Select Check as the payment option
- Click on Scan Check if the first scan was unsuccessful or if a check payment is being made in addition with another payment type
- The Check number, Routing number & Account number will be automatically placed into their respective fields

Annotations on the right side:

- Enter the Bank Number (This is not a required field)
- Click on the Process Using ACH button to electronically deposit the check
- If the customer would like this checking account to be auto billed each billing cycle, check the Auto Debit Future Rent box
- Select the Account Type & Account Class

2.8.5 PAY BY CREDIT CARD

Click in the Credit Card checkbox to start the credit card payment process. If you are using our preferred credit card processing system **Pay Mover** you will find processing credit card payments to be extremely easy and virtually automatic. If you have PCCharge as your credit card processing system there may be additional steps that must be taken during the payment process. Please refer to the PCCharge reference documentation for additional instructions.

USING THE CREDIT CARD SCANNER

From the **Accept Payment** dialog box click on the **Credit Card** check box. Storage Commander will prompt you to scan the credit card, at this time place the credit card into the credit card scanner, move the credit card quickly through the scanner. **Avoid stopping midway through the scan.**

If the scan was successful you will hear a beep from the scanner followed by a green light on the scanner. Verify that the name, address, card type, card number and expiration date on the card matches the information on the screen.

If the customer has agreed to automatic billing click on the **Automatically bill credit card for future rent** check box.

If the credit card software module (PCCharge) was purchased and installed, you can click on the **Charge Card Now** to process the card and complete the transaction.

MANUALLY ENTERING CREDIT CARD INFORMATION

If you did not purchase the Storage Commander credit card scanner and processing software, and are using a credit card processing system supplied by your bank or other merchant system, you can still enter credit card payments into Storage Commander using the following steps:

Process the credit card through your current credit card system to obtain an approval code. Click on the **Credit Card** check box.

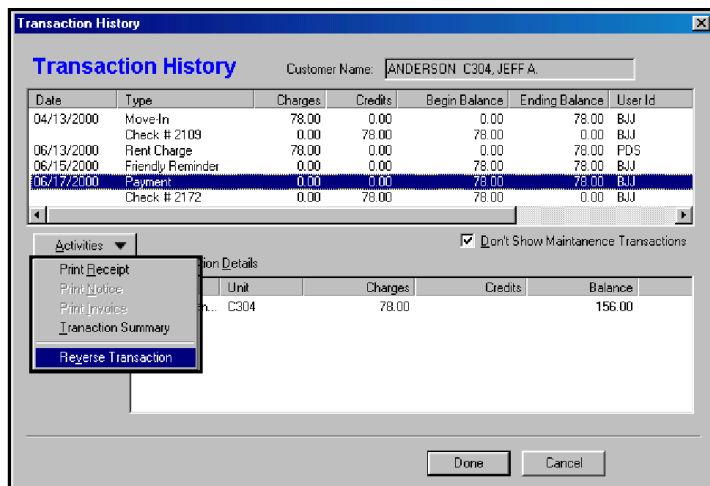
Verify that the name on the card matches the name in the **Name On Card** field in the Storage Commander **Accept**

Payment dialog box. If the name does not match enter the name and address of the card owner.

Enter the **Card Type**, **Card Number**, **Expiration Date** and **Approval Number** into the appropriate fields. Click on **Finish** to complete the rental payment.

2.9 REVERSING A PAYMENT

Storage Commander allows a user who has the proper security authorization to reverse a payment. Once the transaction has been reversed, all financial reports, such as the Payment Activity and Deposit reports, will be adjusted to remove the transaction from the reports; however, an audit trail is maintained in the affected customer transaction history and in the Reversed Transactions audit report.

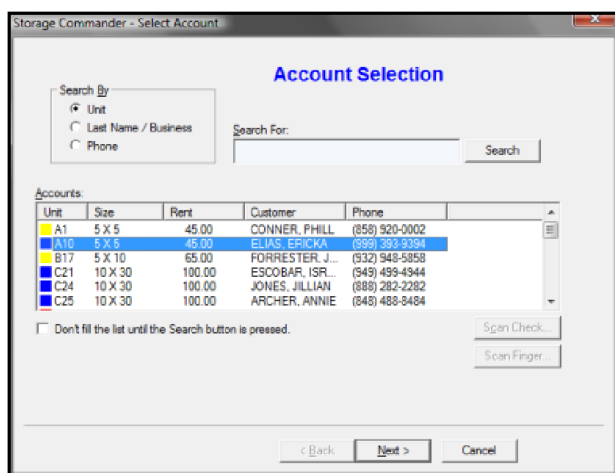


Using the **Site-Map**, **Customer** or **Unit** button on the toolbar, or by selecting Account History from the Activities pull down menu, open the customer's **Transaction History**. Select payment transaction to be reversed and click on the **Activities** button. Select **Reverse Transaction**. Storage Commander will display a warning message informing you that once a transaction has been reversed it cannot be reversed again. Selecting Yes will complete the reversal of the highlighted transaction. Selecting No will return to the Transaction History screen.

NOTE: Transactions cannot be reversed after End Of Day has been run for the day the transaction was made.

2.10 PROCESSING A RETURNED CHECK

To process a check that is returned from the bank for insufficient funds, select the **Activities**|**Returned Check** menu or the **Returned Check** button on the toolbar to display the following dialog:



Select the customer either by scrolling in the list and clicking on the customer's entry, or by selecting the **Last Name** search button and typing in the first few characters of the customer's last name. Once you've selected the customer, click on the **Next** button to continue to the following Select Payment dialog:

The Select Payment dialog displays a history of the checks that the selected customer has written. Click on the entry for the check that has been returned and then click the **Next** button to continue to the **Returned Check Information** dialog:

Verify the Customer and payment information and click the **Finish** button to complete the returned check transaction. If a fee was assigned for returned checks, the fee will be applied to the customer's account and the paid through date to be moved back based on the dollar amount of the check. A returned check letter will also be printed.

2.11 CUSTOMER NOTES

Storage Commander supports a highly sophisticated messaging system, that allows the user to select from four different note formats depending on the relative importance of the note or if the note needs to be displayed at the customer level or unit level. The four note / message formats are:

Customer Notes. Notes that are entered into this section will be added to the Collection Worksheet and Customer Detail report, they can also be viewed in the customer information panel when the mouse is positioned over a unit by selecting Show Customer Notes from the Maintenance | System Setup | Site Map setup screen. Customer notes can be edited and/or removed at any time

CREATING & EDITING CUSTOMER NOTES

To add a note to a customer's account, select the customer from the tool bar or by right clicking on the customer's unit. Once the customer has been selected, click on the Details tab. From the details screen, click on the Notes tab. All data entered into the notes screen will be saved to the customers account, and can be accessed at any time, even after the customer has moved out.

Enter customer notes into the Notes box.

Notes may be edited or removed at any time, and will appear in the Customer Detail report as well as the Collections Worksheet.

Enter customer Alert notes into the Alert box.

Alert messages will automatically Pop Up when a user attempts any type of transaction to a customers account.

To remove an Alert message click on the **Clear Alert** button.

CREATING & EDITING ALERT MESSAGES

Alert messages allow on site managers to post messages to a customer's account that will be automatically displayed whenever any type of account activity is detected.

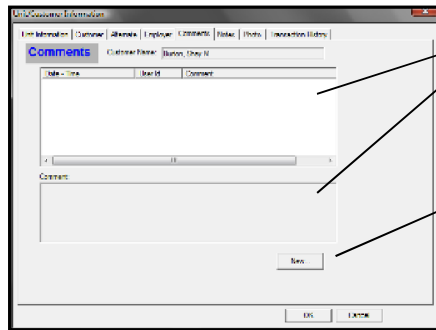
To add an Alert Message to a customer's account, select the customer from the toolbar or by right clicking on the customers unit, once the customer has been selected click on the **Details** tab. From the details screen, click on the **Notes** tab and enter the message into the Alert Message box. Alert messages will remain on a customers account until they are removed by clicking on the Clear Alert button

CUSTOMER COMMENTS

Customer comments differ from customer notes in that once they are entered, a date and time stamp is added to the note along with the id of the logged in manager. When the note is saved, it cannot be altered.

To add a comment to a customer's account, select the customer from the toolbar or by right clicking on the customer's unit. Once the customer has been selected, click on the **Details** tab. From the details screen, click on the **Comments** tab. Next click on the **New** button and enter the message into the Comments Message box. Click on the **OK** button to save the message.

****Note: It is strongly recommended that you review the message prior to saving it, as the message cannot be edited or removed from the customers account once it has been saved.**



Any previous comments will be listed in the upper box, and will show the Date & Time the message was added to the account, as well as the id of the manager that entered the message and a brief description of the comment

To write a new comment click on the New button and enter the comment into the text box. When you have completed the comment click on the OK button to save the message.

CREATING AND EDITING UNIT NOTES

Unit notes allow messages to be posted at the unit level and will stay with that unit regardless of the turnover of tenants after the note has been posted.

Unit notes are generally used to describe unique conditions that pertain to a specific unit. For example, Unit A101 has a support pole in the left corner of the unit; unit C12 has a water pipe attached to the back wall.

To add a note to a unit open the **Unit Maintenance** window by clicking on the **Maintenance | Units** pull down menu. Enter the number of the unit in the Unit Number field, when the unit has been selected, click on the **Notes** button and enter the note. When completed, click on the **OK** button to save and exit the unit note box.

Enter the unit number here.

Click on the Notes button to enter the unit note. Click on OK to save the note and return to the Unit Maintenance screen

Click on Done to return to the main screen

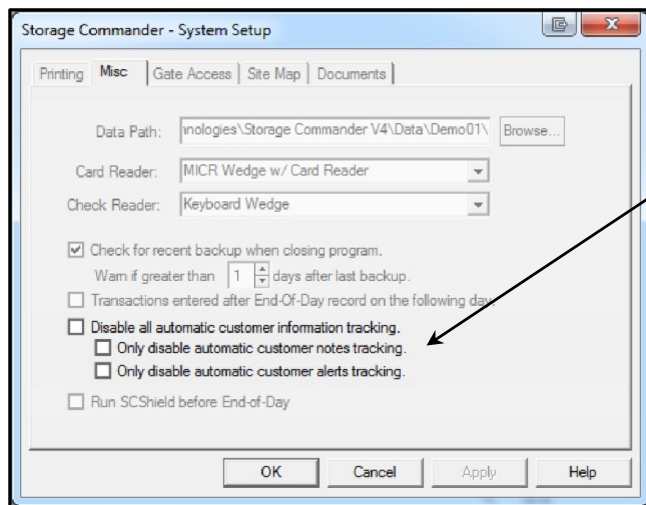
Unit notes can be viewed by opening the details screen for the customer and selecting the Unit tab or by selecting the unit and opening its details screen.

Unit notes will automatically display on vacant units in the customer information panel, thus giving the manager an opportunity to view the note prior to renting the unit.

2.12 CUSTOMER INFORMATION TRACKING

Changes to customer information, such as; Address, Phone Number, Alternate, Employer, Notes, and Alerts, are tracked and listed in the customer Comments notes screen.

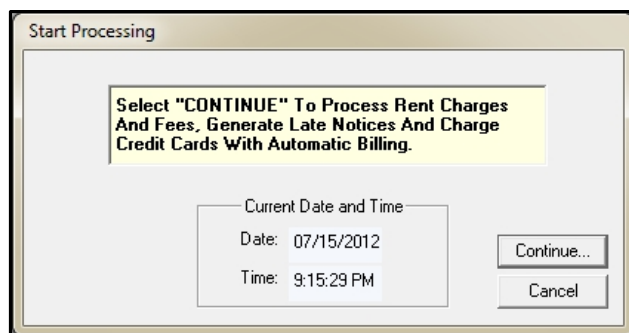
Customer Information Tracking is configured in the Maintenance | System Setup | Misc. section. From here you can activate or disable all customer information tracking, customer notes tracking or customer alerts tracking.



Select tracking functions to meet your needs

2.13 END OF DAY PROCESSING

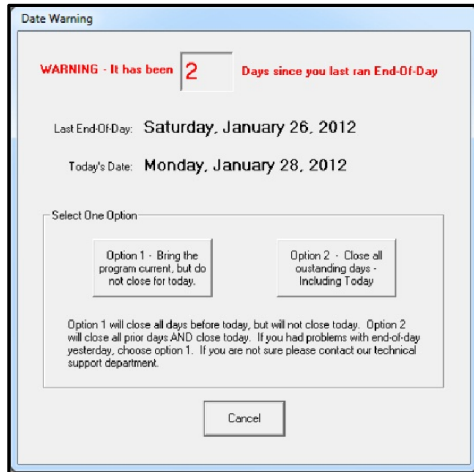
Click on the **End of Day** toolbar button or select the **Activities/End of Day Processing** menu to perform the end of day processing. End of day processing will cause rents and fees to be applied for customers whose billing cycle comes due, print any invoices for upcoming billing cycles (if so configured), assess any late, pre-lien, or lien fees and print the associated notices. Selecting the menu causes the following dialog to be displayed:



It is important that the system date and time are accurate or the end-of-day processing will generate errors. To correct the date and time, use the Date/Time control panel from the Windows Start/Settings menu. The Storage Commander login screen also has a button that you can use to set the date and time; logoff and login again to access the button.

End of day processing is intended to be run at the end of the business day when all transactions to be counted for that day have been completed. Any payments or other transactions posted after end of day has been run will be credited for the next day. This is important to understand as Storage Commander will assess late fees and change the status for delinquent customers as part of the end of day processing. Payments received after the end of day processing has been completed will not prevent late fees from being assessed even if they are entered later that same day. For instance, if end of day processing is run at 6:00 PM, and a customer goes into a delinquent status as a result, they will still be assessed the fee (if applicable) even if they came in and made a payment at 7:00 PM later that same evening.

When end of day is run, Storage Commander checks to see if it has been more than one day since end of day was last run. If end of day was run the day before, then Storage Commander completes the end of day processing and increments the internal counter indicating when end of day was last run.

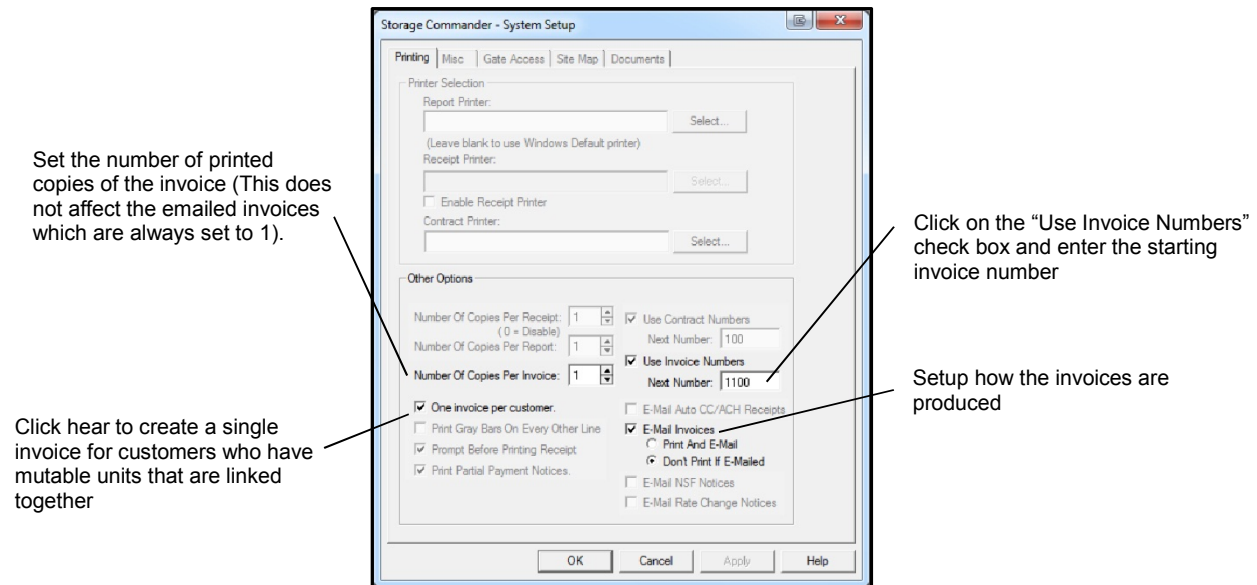


If more than one day has elapsed since end of day was run Storage Commander displays a message indicating the number of days that have elapsed from the last end of day processing. This gives the user the option of running a Start of Day (all rents and fees are processed as of the current date) or End of Day (all rents and fees are processed as of tomorrow's date).

Once the end-of-day processing has begun, a progress dialog is displayed, but no user action is needed. Note that data base integrity could be compromised if the end of day processing is interrupted before it is finished; **please do not turn off the computer while the End Of Day process is running.**

2.14 INVOICING

Invoices will be automatically generated for all customers who are on a billing plan that includes invoicing (see Setup Billing Plans referenced earlier in this manual). The invoices will be printed, emailed, or both depending on how the invoicing function was setup, during the End Of Day process.



2.14.1 SETTING AUTO INVOICE NUMBER

To initialize invoice numbering, click on the **Maintenance** pull down menu and select **System Setup**. In the bottom third of the system setup screen, click on the "Use Invoice Number" check box to activate the "Next Number" input field. Enter the starting number for the invoices.

Storage Commander will automatically increment the invoice number for each invoice automatically created during end of day.

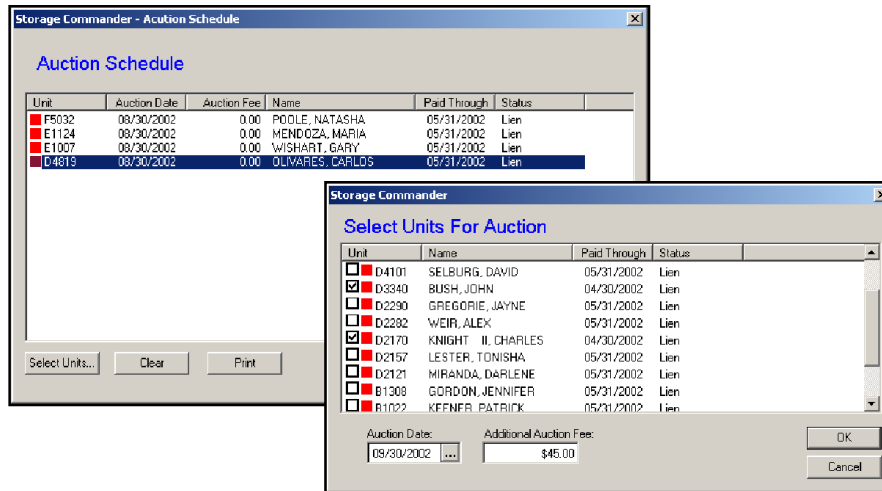
2.14.2 PRINTING AND EMAILING INVOICES

To configure Storage Commander to produce invoices as printed documents or emailed documents, click in the **Email Invoices** check box and select **Print And Email** or **Don't Print If Emailed**.

2.15 SCHEDULING AUCTIONS

The Schedule Auctions function allows you to use Storage Commander to track all customers who have qualified for auction, place them into an auction list and allow you to select which customer you will auction, set the auction date, charge a special auction fee, print an auction notice or print a scheduled auction report. You may even have the calendar show you what days you have scheduled auctions throughout the month.

In order to use this feature, you must select a late step (usually the last late step) as a Scheduled Auction step (see **Setup Late Status**).



2.15.1 VIEWING SCHEDULED AUCTIONS

Selecting the Schedule Auctions tool in the tool bar will display all previously scheduled auctions.

2.15.2 SCHEDULING A CUSTOMER FOR AUCTION

Click on the Schedule Auction button in the tool bar to open the Auction Schedule dialog box. Click on the Select Units button to open the Select Units For Auction list box. Clicking on a unit in the list places a check mark in box next to the unit number and selects the unit/customer for auction.

After all units/customers have been selected, enter the date of the auction. Additional auction fees can also be assessed to all units/customers selected for this auction.

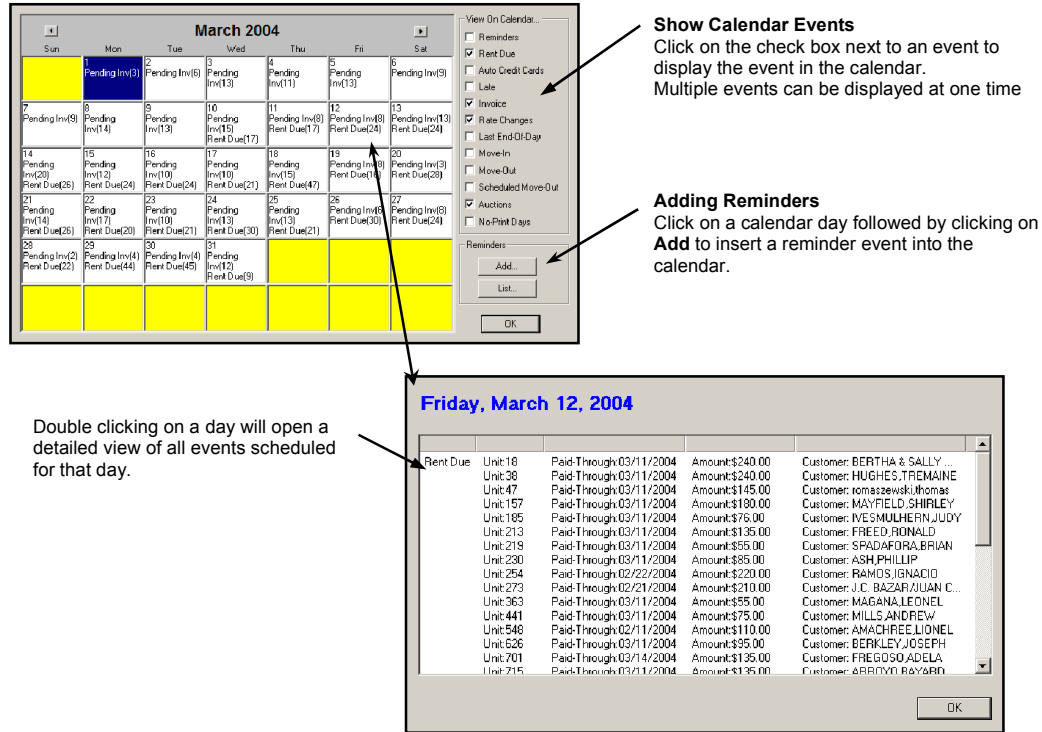
Click on the OK button bar to complete the scheduled auction.

2.15.3 REMOVING A CUSTOMER FROM AUCTION

Storage Commander also allows you to manually remove a unit/customer from the Auction Scheduled list and return them to the Select Units For Auction list. To do this, highlight the unit/customer to be removed from the Auction Schedule list, when the unit/customer has been selected and confirmed, click on the **Clear** button. This will remove the unit/customer from the Auction Schedule list. Units/customers that have been removed from a scheduled auction can be rescheduled at any time.

2.16 USING THE CALENDAR

The calendar function allows the user to view upcoming events or past events such as: when rent will be charged, scheduled move-out or move-ins. All selected event are displayed in the calendar on the appropriate day. Double clicking on a day that indicates one or more events scheduled for that day will open a widow showing a detailed list of all activities scheduled.



2.16.1 ADDING REMINDERS

Open the calendar and left click on the day you wish to add a reminder to, next click on the **Add** button in the

Date To Show

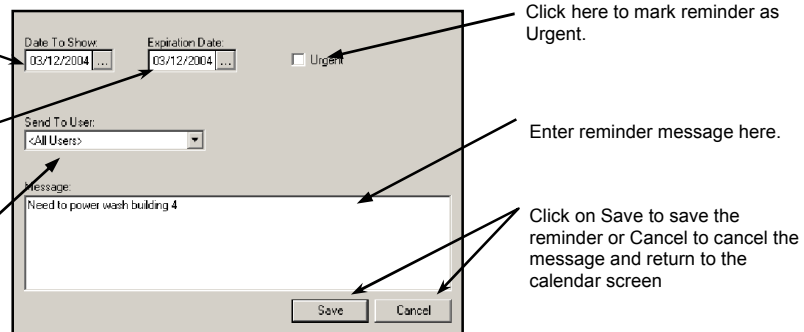
The date you selected in the calendar will be displayed here, or you can enter a new date.

Expiration Date

Enter a Expiration date to indicate how long the reminder is to remain in effect.

Send To User

Click on the down arrow to restrict the viewing of a reminder to particular manager



Reminders section of the calendar. This will open the reminders dialog box where you set the date to show the reminder and the date the reminder will expire.

You can also restrict the reminder to be seen by specific managers by clicking on the down arrow in the **Send To User** field and selecting the name of the user from the list. Add the text of the message in the **Message** field and click on **Save** to save the message and return to the calendar. To display reminders on the calendar, click on the **Reminders** event in the **View On Calendar** section.

2.17 SELLING MERCHANDISE

To record merchandise sales independent of other transactions (such as move-in), select the **Activities/Sell Merchandise** menu or click on the **Merchandise** button on the toolbar to go to the following dialog:

Select each merchandise item to be sold and click on the **Add to Order** button to add it to the bottom list. Click on the **Change Qty** button to change how many of each item is being sold. Click on the OK button to continue to the following dialog:

Enter the payment information into the standard payment dialog.

Note that a customer field is left blank for stand-alone merchandise sales.

Click **Finish** to complete the transaction and print a receipt. The quantity of inventory is also deducted from the inventory data base.

2.18 CUSTOMER LIST

The Customer List button on the tool bar is used to display a list of all active as well as all inactive customers.

To view the customer list, click on the Customer List button or click on the Lists from the menu and select Customers.

Name	Status	Unit	Balance	Phone	Move-In
Smith, Julie	Sale	D12	230.00	(909) 839-3882	09/25/200
REDDY, KAREN	Current	C32	0.00	(888) 292-9292	11/06/200
PHILLIPS, ST...	Current, Current	C37, D5	0.00	(884) 929-8758	10/31/200
MENDEZ, JOY	Current	C30	0.00	(887) 773-7373	11/03/200
JUMPING, JOJO	Late	E6	90.00	(838) 383-8383	10/24/200
JONES, JILLIAN	Current	C24	-80.00	(888) 282-2282	11/05/200
Johnson, Sam	Pre-Lien	D15	115.00	(123) 123-1231	10/21/200
Jackson, Alan	Current	D16	-80.00	(618) 383-8383	10/17/200
HART, ROSS	Current	D9	0.00	(884) 503-0030	09/28/200
HABINIEGHT, ...	Current	C33	0.00	(939) 995-4959	10/30/200
GARCIA, JAMES	Sale	D14	150.00	(859) 399-9294	10/03/200
FORRESTER, ...	Pre-Lien	B17	100.00	(932) 948-5858	10/17/200
FILLIOW, FRA	Current	D19	0.00	(888) 828-8282	10/29/200

The colored block to the left of the customers name denotes the current status of the customer.

The column headers indicate the type of information contained in the column.

The width of each column can be adjusted by placing the mouse pointer on the vertical line that separates each column. As the mouse pointer passes over the line separator, it changes into a left and right pointer. Click and hold the left mouse button down, as you move the mouse left or right you will see the

column increase or decrease in width. When you are satisfied with the width of the column, release the left mouse button. Clicking on a column header will cause the data contained in the column to be sorted as ascending (123... abc...), or descending (zyx..., 321...).

2.18.1 NAME SEARCH

To locate a customer using the search feature, click on the Customers button in the tool bar or select Customers from the Lists/Customers pull down menu. Type in the customer name. As you type, Storage Commander will immediately start to compare names in the database with the characters you are typing.

NOTE: Storage Commander does not require you to enter the name into a special search box. Just start typing and Storage Commander will find the customer.

2.18.2 CUSTOMER DETAILS

Clicking on the **Details** button in the **Customer List** dialog will open the “Customer Information” tabbed dialog box for the currently selected customer. Clicking on the Customer, Alternate, Employer or Notes tabs allows the information contained in these screens to be viewed or edited.

Click on the **Credit Card** button to view or edit the customers credit card information.

Click on the **Access Control** button to view or edit the customers access number or access options.

Click on the ACH Settings to setup the customer account for automatic deposit of check payments.

2.19 TRANSACTION HISTORY

Transaction history shows a detailed list of all account transactions that have been assessed against this customer from their move-in up to the time of viewing their history. Notices, payment receipts and even the transaction history can be printed or reprinted at any time. In addition, payments and/or adjustments can be reversed through the Transaction History screen.

Transaction Details shows a summary of the transaction type highlighted above.

Print a detailed history transcript by clicking here and selecting Transaction History (Detailed) or Transaction Statement (Summary).

Date	Type	Charges	Credits	Begin Balance	Ending Balance	User ID
06/03/2012	Check # 2322	0.00	85.00	98.00	12.93	ADMIN
06/03/2012	Payment	0.00	0.00	12.93	12.93	ADMIN
06/21/2012	Lease	0.00	12.93	12.93	0.00	ADMIN
06/21/2012	Rent Charge	80.00	0.00	0.00	80.00	ADMIN
06/25/2012	Step 1 - Lat...	10.00	0.00	80.00	90.00	ADMIN
06/30/2012	Step 2 - Prei...	25.00	0.00	90.00	115.00	ADMIN

Type	Unit	Charges	Credits	Next Bill	Paid Thru
Applied Rent ...	D15		12.93	06/03/2012	06/03/2012

All transactions are identified by the user ID, who was logged on at the time the transaction was entered into the system.

The Transaction History dialog box can be opened by clicking on the **Activities|Account History** pull down menu; clicking on the **Customers** button in the toolbar and selecting **Details** or by positioning the mouse pointer over the customers storage unit and single clicking using the Right mouse button and selecting **History** from the list.

2.19.1 REPRINTING NOTICES & RECEIPTS

Storage Commander allows you to reprint a notice or receipt regardless of how old the notice or receipt may be. To reprint a notice or receipt, open the Transaction History dialog box by positioning the mouse pointer over the customer’s storage unit and click right click; choose **History** from the list. The Transaction History dialog box can also be opened from the **Customers** button in the tool bar or from the **Activities/Account History** pull down menu.

From the Transaction History dialog box highlight the document to be reprinted, click on the Activities button and select the appropriate document from the list.

2.19.2 PRINTING HISTORY TRANSCRIPTS

To print a historical transcript of a customer's account covering a specific time frame, open the Transaction History dialog box by positioning the mouse pointer over the customer's storage unit and right click; choose **History** from the list. The Transaction History dialog box can also be opened from the **Customers** button in the toolbar or from the **Activities/Account History** pull down menu.

Click on the **Activities** button bar and select **Transaction Summary**. Enter the **From** and **To** dates and click on the **OK** button. Storage Commander will create a transaction summary report detailing all account activities recorded between the from and to dates entered earlier.

2.20 UNITS LIST

Click on the **Units** button on the toolbar to open the **Units List** box,

Clicking on a column header will sort the column in ascending or descending order

Clicking on the Details button opens the selected units Customer/Unit information dialog box.

Unit	Size	Building	Status	Rent
A1	5X5	A	Rented	45.00
A2	5X5	A	Available	45.00
A3	5X5	A	Available	45.00
A4	5X5	A	Reserved	45.00
A5	5X5	A	Available	45.00
A6	5X5	A	Rented	45.00
A7	5X5	A	Available	45.00
A8	5X5	A	Rented	45.00
A9	5X5	A	Available	45.00
A10	5X5	A	Rented	45.00
B11	5X10	B	Available	65.00
B12	5X10	B	Available	65.00
B13	5X10	B	Available	65.00
B14	5X10	B	Available	65.00

Click on the Print button to print a hard copy of the unit list as displayed in the Unit List box.

2.21 CLOSING REPORTS

The Close Report button on the toolbar is used to close a report that has been opened from the **Reports** pull down menu.

Click on the Close Report button to close the current report and return to the Storage Commander main screen.

2.22 PRORATE CALCULATOR

The prorate calculator is a useful tool for quickly determining the prorated amount for move-ins, move-outs, and basic time periods.

To use the calculator, select if you are calculating a move-in, move-out, or basic time period prorate.

Then, fill in the monthly rent for the unit you are calculating the prorate for.

Select the desired date range that you would like the prorating calculated for.

The daily prorate and total prorate will appear at the bottom. When you are done, click the **OK** button.

3 Advanced Functions

3.1 BACKUP & RESTORE

Developing a comprehensive backup policy is extremely important. If your computer backups are kept up to date, the reality of a computer crash can be minimized by restoring lost data from backup files.

Storage Commander makes backing up and restoring data an easy and fast operation. The backup that is created using the Storage Commander backup routine creates a complete copy of all databases used for the facility. With this backup you can re-install Storage Commander on a new computer, run the restore utility and be back in operation with little or no loss of data or time.

Note: We recommend making daily backups of Storage Commander. Should something go wrong, a computer crash for instance, then you can recover the information that was lost because you have done a previous daily backup.

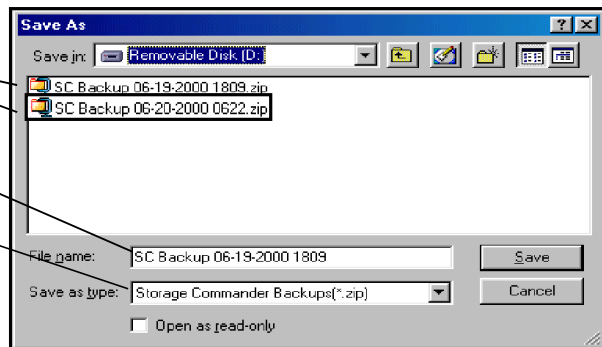
3.1.1 BACKUP

To make a Backup of the current Storage Commander system (all database files, pictures & site-map), click on the **Files** pull down menu and select **Backup** from the list. The **Save As** dialog box will open defaulting to the backup location that was last used, if you would like to change the backup location click on the down arrow to the left of the *Save In* list box and select a new location.

Storage Commander uses the current date and time as part of the backup file name, this gives you the ability to maintain a history of backup data.

You can assign a unique name to the backup file by entering the name here.

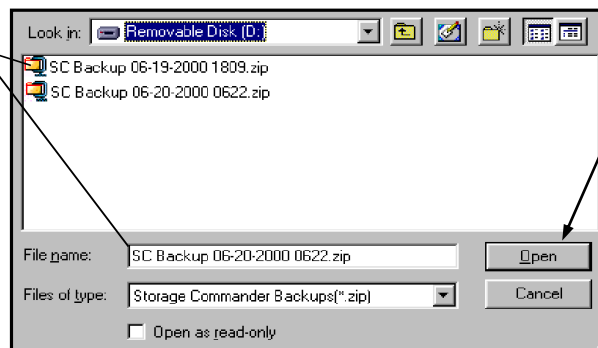
All backup files must be saved in a zip file format.



3.1.2 RESTORE

To Restore a backup, click on the **Files** pull down menu and select **Restore** from the list. Storage Commander will issue a warning indicating that proceeding with a restore will overwrite all data saved in the current facility with the facility data contained in the backup. Click on the **Yes** button to proceed with the restore or on the **No** button to cancel the restore process and return to the Storage Commander main screen. Clicking on the Yes button will display the Open dialog box. Storage Commander remembers where you saved the last backup and returns you to that location. If you need to retrieve a backup file from another location, click on the down arrow to the right of the *Save in* list box and select the drive/location of the backup file. When the backup file is located, click once on the file and once again on the **Open** button. This will start the restore process.

Clicking on a file automatically enters the file into the File Name box.



Click on **Open** to restore the backup.

3.2 PRINTING THE SITE-MAP

To print a current copy of the map, click on the **File** pull down menu and select **Print**. Maps are printed at the current zoom level. To zoom in or out, click on the **Zoom** pull down menu and select Zoom In or Zoom Out.

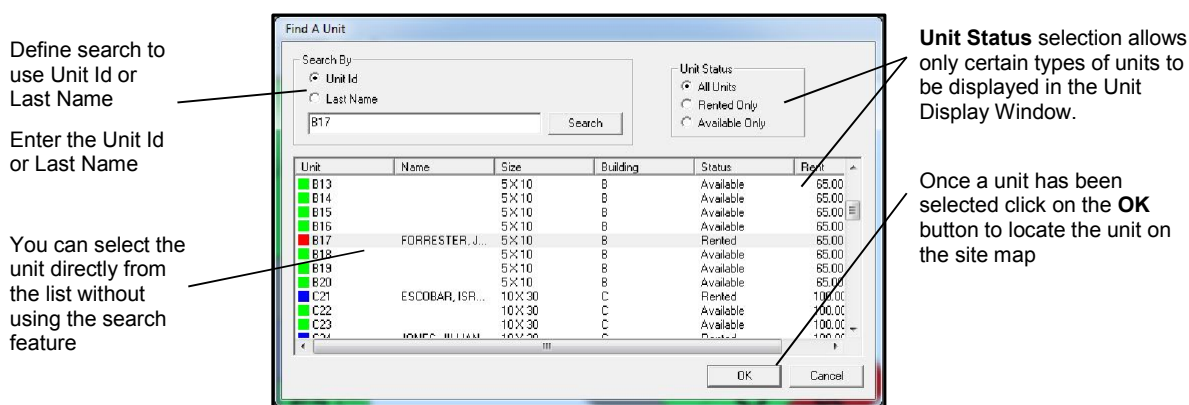
Using Print Preview in the File pull down menu will give you a view of the map before you commit it to the printer.

3.3 UNIT LOCATOR

If you are having difficulty locating a unit on the site map you can use the Unit Locator feature. With this feature, you can have Storage Commander automatically scroll the site map to a units location, position the mouse pointer over the unit and flash the unit on and off.

To access this feature click on the Maps pull down menu item located at the top of the screen, select **Find A Unit**.

In the unit location box, you can define the unit search criteria by entering the unit id or the last name of the customer in the **Search By** section. You may also select the unit from the unit display window.



The **Unit Status** selection box allows you to either view all of the units in the facility, only rented units or only available units.

Once you have entered the unit you wish to locate, click on the **OK** button to initiate the search. When the unit is located, the site map will automatically scroll to the unit; the mouse pointer will then be placed over the unit and the unit will start flashing.

3.4 ADJUSTING AN ACCOUNTS BALANCE

Storage Commander allows a user who has security clearance to make changes to customers' rent, fees, insurance, rent tax or other balances. The user can add to a balance, subtract from a balance or enter a credit to an account balance through the adjustment screen.

To make adjustments to any of the account balances, you must first select a customer. To select a customer using the site map, position the mouse over the customer's unit, right click and select **Adjustment** from the list; this will take you to the **Account Adjustment** screen. An alternative to locating the customer is using the Activities pull down menu, to do this click on the **Activities** pull down menu and select **Make Adjustment**. Locate the unit/customer from the **Adjustment Account Selection** dialog box. Once the customer has been highlighted, click on the **Select** button and this will take you to the **Account Adjustment** screen.

To make an adjustment, determine the balance to be adjusted (*left column*) and enter that amount of adjustment into the adjustment field (*middle column*). Entering a number that is preceded with a minus sign (-10) will credit (reduce) the current balance by the amount entered in to the adjustment field; numbers entered as a credit will be displayed in the adjustment field in parentheses. Entering a whole number will charge (add to) the current balance by the amount entered in to the adjustment field.

Storage Commander can be configured to require an explanation to be entered before the adjustment can be completed.

In the example below, an adjustment was made to reduce the rent balance from \$80.00 to \$75.00

The Current Balance column shows what the balances are prior to any adjustments.

The Adjustment column is where you enter adjustments for each balance.

The new balance column shows the result of the adjustment.

The Explanation box allows notes of any length to be added to the adjustment, and will be included in the Adjustment report.

The Account Information portion of the Account Adjustment screen displays specific information about the customers account.

	Current Balance	Adjustment	New Balance
Rent:	\$80.00	(\$5.00)	\$75.00
Fees:	\$120.00	\$0.00	\$120.00
Other:	\$0.00	\$0.00	\$0.00
Insurance:	\$0.00	\$0.00	\$0.00
Rent Tax:	\$0.00	\$0.00	\$0.00
Balance:	\$200.00		\$195.00
Deposit Paid:	\$0.00	\$0.00	\$0.00
Deposit Due:	\$0.00	\$0.00	\$0.00

Account Information

Unit: C28 Next Bill: 07/06/2012 Rental Rate: \$100.00

Size: 10 X 30 Paid Through: 06/05/2012

Name: Downey, Dave

< Back Finish Cancel

Note: Any adjustments that are made will be recorded in the Adjustment report with the login id of the user who made the adjustment. Storage Commander can also be configured to require an explanation to be entered prior to completing the adjustment.

3.4.1 DRIVER LICENSE READER

If your state driver license has a magnetic strip on the back of the license and the state conforms to the AAMVA national standards, you can fill in the customer information by swiping the license through the optional card reader supplied by Empower Software Technologies.

To use the driver license scanner, click on the **Scan Driver License** button located in the Customer Info screen, to activate the scanner. Slide the driver license through the reader, the customer's name, address and driver license number will appear in the customer information screen. If the scan was not successful, click the **Retry** button and swipe the card again.

Storage Commander - Previous Customer

An existing customer has been found with a matching Driver License or Social Security Number. Click "Select" to use the existing customer or "Cancel" to use the information you just entered.

Name	S.S. Number	DL Number	Active Units	Phone
Smith, Joe	123-45-6789		A4, A14, A15	(

Details... Select Cancel

When you click **Next**, Storage Commander will automatically search for past occupancy based on the driver's license and/or the social security number. If a match is found, this window will appear and allow you to select their previous account to fill in the rest of the information.

If you are not sure if this is the same customer, you can click on **Details...** to view their previous account history and information including notes, photos, and transactions.

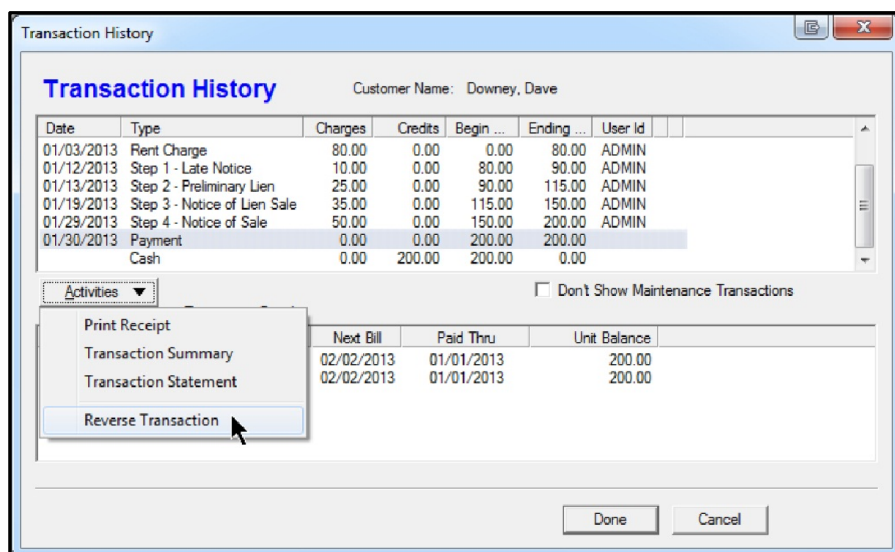
To choose this customer account, simply highlight it and click on the **Select** button.

3.5 REVERSING A TRANSACTIONS

Storage Commander allows a user who has the proper security authorization to reverse payment or move in transactions. Once the transaction has been reversed, financial reports, such as the Payment Activity and Deposit reports, will be adjusted to remove the transaction from the reports. If the reversed transaction was made against a payment that was processed through a customers account, the reversed payment will be logged in the customers Transaction History as an offsetting entry, and also in the Reversed Transactions report. Payment transactions that are made outside a customer account; Such as *Merchandise* payments and payments made through *Other Income*, can also be reversed and will be listed in the Reversed Transactions report.

3.5.1 REVERSING A TRANSACTION THROUGH A CUSTOMER ACCOUNT

Using the **Site-Map**, **Customer** or **Unit** button on the toolbar, or by selecting Account History from the Activities pull down menu, open the customer's **Transaction History**. Select the transaction to be reversed (Move-In or Payment) and click on the **Activities** button. Select **Reverse Transaction**. Storage Commander will display a warning message informing you that once a transaction has been reversed it cannot be reversed again. Selecting Yes will complete the reversal of the highlighted transaction. Selecting No will return to the Transaction History screen.



3.5.2 REVERSING NON-TENANT TRANSACTIONS

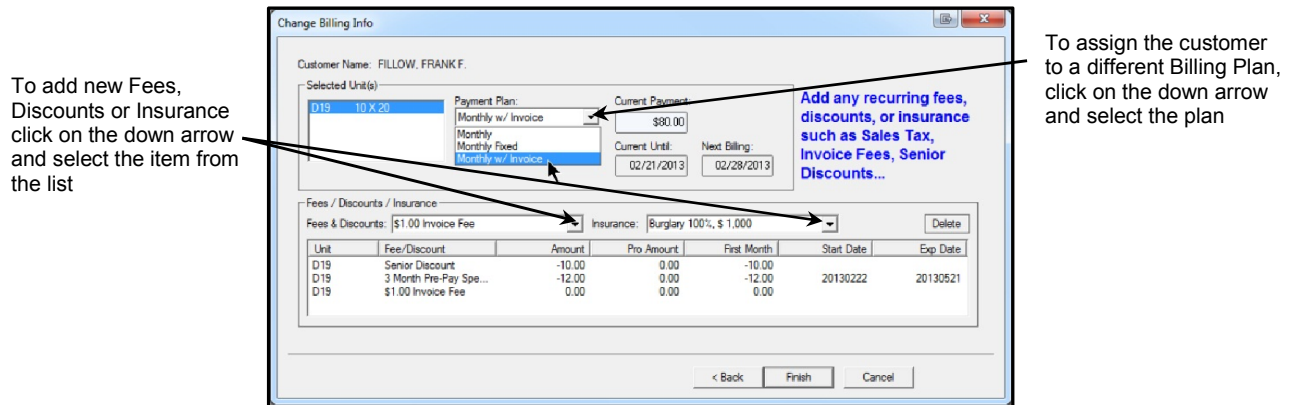
Payment transactions made to not-tenants through merchandise sales and Other Income, can be reversed by clicking on the Activities pull down menu and selecting Non-Tenant Transactions. From the

NOTE: Transactions cannot be reversed after End Of Day has been run for the day the transaction was made.

3.6 CHANGE A UNITS BILLING

Changing a customer current billing plan to another plan that has previously been set up within Storage Commander is a quick and easy operation. Open the Change Billing Info screen by positioning the mouse pointer over the customer's unit, click on the right mouse button and select Change Billing from the list. You may also click on the Activities pull down menu, select Change A Unit's Billing from the list and locate the customer/unit.

From the **Change Billing Info** screen, click on the down arrow to the left of the **Payment Plans** list box to display a list of all payment plans. Select the payment plan to which the customer has requested to be moved to. Add any recurring fees or discounts that may be assessed against this new payment plan by clicking on the down arrow to the right of the **Fee / Discounts / Insurance** list box.

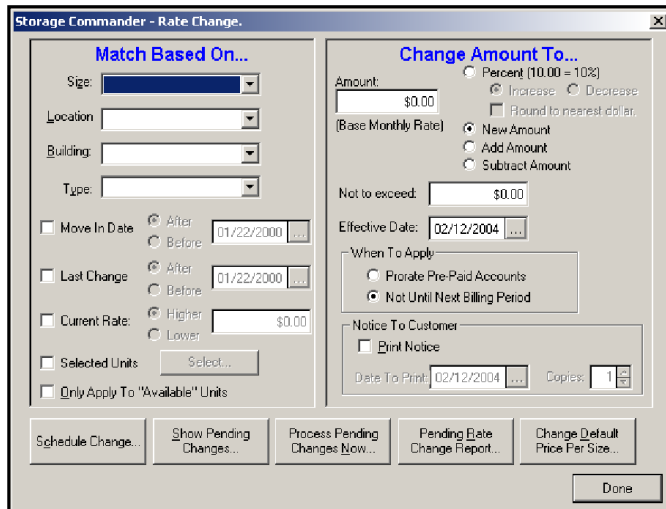


Click on the Finish button to complete the operation.

The new payment plan and any new fees or discounts will go into effect when the customer makes the next rent payment.

3.7 RATE CHANGE

Storage Commander allows managers to increase or decrease rental rates quickly and easily. Rate changes can be designed to affect the entire facility, specific unit **Sizes**, specific unit **Types** (such as **XXXXX** controlled units) Units in selected **Locations**, Units in selected **Buildings**, or even rate changes that will effect specific **Customers**.



Multiple rate changes can be set up to occur on the same date or spread out over different start dates.

Rate change letters can be selected to print 'x' number of days prior to the selected rate change. The rate change itself can be configured as a **Percentage** increase or decrease, **Add** to or **Subtract** from the current rate or a completely **New** rate.

Rate changes can be configured so that they only affect customers who moved in prior to or after a certain date, who are above or below a specific rate or not to allow the rate increase to exceed a specific "cap" rate

Rate Changes are setup from the **Maintenance|Rate Change** pull down menu.

The Rate Change dialog box is where you will define the parameters of the rate change and schedule for the rate change to take effect. This is also where you can access the default rates for the unit sizes. Anytime you do a rate change to increase the overall rates for a particular size, you will want to change the default rate so that when units become available they will have the new rate.

Listed below are detailed descriptions of each of the parameters available for rate changes:

Size: Click on the down arrow to select a specific unit size to be used in the rate change.

Location:	Click on the down arrow to select a specific Location to be used in the rate change.
Building:	Click on the down arrow to select a specific Building to be used in the rate change.
Type:	Click on the down arrow to select a specific unit Type to be used in the rate change.
Move In Date:	Limits the rate change to those customers who moved in before or after the date entered into the Move In Date field To use this parameter; Place a check mark in the Move In Date box and enter a date in the date field, select “ Before ” for customers that moved in <i>before</i> the date indicated in the date field or “ After ” for customers that moved in <i>after</i> the date indicated in the date field.
Last Change:	Limits the rate change to affect only customers who’s last rate change was before or after the date indicated in the Last Change date field.
Current Rate:	Sets the rate change to affect customers who are “ Higher ” or “ Lower ” the amount entered into the Current Rate field.
Selected Units:	Allows you to select individual customers from a list to receive a rate change. <i>Note: Selecting individual customer does not require nor will it use any of the parameters listed above.</i>
Only Apply To “Available” Units:	Limits rate change to Available “unoccupied” units.

The previous section described the parameters used in the selection process of a rate change; the following section describes the process used entering the new rental rate and when the new rate will come into affect.

Amount:	Enter the amount of the rate change. <i>Note: With the exception of “New Amount” selection, all rate changes will be calculated based on the current unit rate of each individual unit.</i>
Percent:	The number entered into the Amount field will be percentage Increase or Decrease from the base monthly rate. This parameter can also be set to round to the nearest dollar.
New Amount:	Replaces the current rental rate with the rate entered into the Amount field.
Add Amount:	Adds the number entered into the Amount field to the current rental rate.
Subtract Amount:	Subtracts the number entered into the Amount field from the current rental rate.
Not To Exceed:	Enter the maximum rental rate here. Storage Commander will automatically adjust the rate increase on a unit-by-unit bases if the scheduled rate increase exceeds the amount entered in this field.
Effective Date:	Enter the date the rate change is to take affect.
When To Apply:	There are two ways rate changes can be applied to a customers account: Prorate on Pre-Paid Accounts: causes the rate change to be applied to customers who have paid in advance (or through) the effective date of the rate change. Storage Commander will calculate the prorated difference between the months the customer has pre-paid beyond the date the new rental rate was applied, the result will be applied to the customers account as rent due. Since the customer pre-paid the account, the paid through date and next due dates were moved up; the prorated rent that is now due as a result of the rate change will not cause the customer to enter a late step, but it will be applied to the customers next rent payment. Not Until Next Billing Period: The rate change will not be applied to customer’s accounts until their next billing period, even if the next billing period is after the effective date of the rate change.
Notice To Customer:	To allow Storage Commander to automatically print rate change notices to customers that will be included in a scheduled rate change, place a check mark in the Print Notice check box. When Storage Commander has detected that this option has been selected, it will enable the Date To Print date field, enter the date (generally 30 days prior to the Effective Date) and enter the number of copies to print.

When the rate change set up is completed, click on the **Schedule Change** button bar to enter the rate change into the scheduler. At this point, you can set up another rate change and schedule it to occur at another time.

Click on the **Show Pending Changes** to view all rate changes that have been entered into the scheduler.

Clicking on the **Process Pending Changes Now**, will cause all rate changes that are scheduled to be implemented at the close of day (End Of Day) to be processed immediately.

Click on the **Done** button bar to exit (close) the Rate Change window.

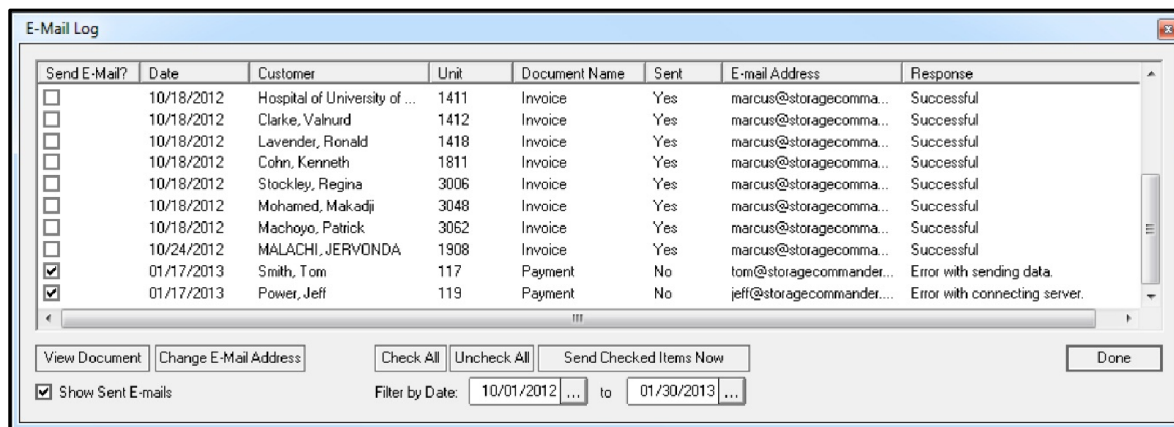
3.7.1 RATE CHANGE PREVIEW

To preview who the rate change will affect and to see how the rate change will affect the facility's financials, go to the **Reports** pull down menu and select **Units/Pending Rate Changes**. This will display a report that will list all customers effected by the rate change, their old rate, new rate, unit number and size.

At the top of the report you will find a summary of all the parameters that were used in the rate change. At the bottom of the report are the totals of the old rate, new rate and net change.

3.8 E-MAIL ACTIVITIES CONTROL PANEL

As emails are processed the result of the email attempt is entered into the E-Mail log. This log will display all e-mail attempts over a selected period of time, and will indicate if the e-mail was successfully sent or if it failed. In addition the E-Mail log will list the date the e-mail attempt was made, storage customers name, unit number, name of the document that was e-mailed, if it was sent successfully or not, the e-mail address of the intended recipient, and the response we received back from the recipients e-mail server.



3.8.1 SHOW E-MAIL

To display a list of e-mail documents, enter a date range into the start date and end date fields. The e-mail log will display all documents that failed to e-mail within the date range. To see all documents (failed and successful) click on the Show Sent E-Mails check box.

3.8.2 VIEW E-MAIL DOCUMENTS

To view the document of an attempted e-mail, select the customer and click on the **View Document** button.

3.8.3 CHANGE E-MAIL ADDRESS

To change an e-mail address, select the customer and click on the **Change E-Mail Address** button. Enter the new e-mail address and click on the OK button to save the new e-mail address.

3.8.4 RE-SEND AN E-MAIL

Click on the check box in the Send E-Mail column for the customer you are attempting to re-send the e-mail to. Click on the **Send Checked Items Now** button to re-send e-mails to all selected customers.

3.9 UNIT MAINTENANCE

Unit Maintenance is where physical adjustments to a unit are made changing the size of a unit. For example, Unit Maintenance is also where customer specific data can be modified. For instance, move in and payment dates can be changed here.

To open the Unit Maintenance dialog box, click on the **Maintenance** pull down menu and select **Units**.

Enter the unit number in the **Unit Number** field. *Note: Always verify the customer name with the name in the **Customer Name** field, or if changes are being made to an available unit verify that the Customer Name field is **blank** and that **Available** is in the **Available Status** field.*

Make whichever changes are necessary to the unit/customer. Once all changes have been completed, click on **Save**. If you have selected the checkbox requiring explanations in **Maintenance | Program Setup | Adjustments**, then any changes that you make here will require an explanation to be entered at the bottom in the **Explanation of Changes** field. The explanations that are entered will show up in the transaction summary for the unit. If additional units/customers need to be modified, enter the next unit number into the Unit Number field and repeat. When the changes for all units/customers have been completed, click on **Save** and then on **Done**. This will return you to the Storage Commander main screen.

A detailed description of all fields in the Unit Maintenance dialog box are listed below:

Unit Number: Enter the unit number of the unit/customer to be modified here.

Size: The size of the selected unit is displayed here. Click on the down arrow to view a list of all available unit sizes. Select the new unit size from this list.

Note: Selecting a new unit size will change the size of the selected unit on the Site Map. If the new size is not listed in the available sizes list, you can create the new size by going to Maintenance/Program Setup/Unit Sizes. See section Create Units for more information.

Description: This field shows the description of the unit (a unit description was made when the unit was initially created).

Rent: The rental rate for this unit is shown here. Initially, this rate is taken from the master rate table stored in the unit size database. If you make a change to the rental rate here, the

	customer assigned to this unit will be charged rent based on the new amount; however, when the unit is vacated, its rate will return to the rate stored in the master rate table.
Type:	This field shows the Unit Type. Click on the down arrow to select a different type for this unit.
Building:	This shows the building that the unit was originally assigned to. Click on the down arrow to reassign the unit to a different building.
Location:	This field shows the Location of the unit (a unit Location was made when the unit was initially created).
Square Feet:	Indicates the square footage of the unit based on the unit size (unit width x depth).
Available Status:	Used to set the rent status of the unit. Available choices are: Available , unit can be rented. Rented , unit is currently rented. Reserved , unit has been reserved to a customer in the waiting list. Unavailable , unit cannot be rented.
Move In Date:	Shows the date of the original move in. This date can be modified, if necessary, by entering the new date into the move in date field or by clicking on the calendar control button and selecting the move in date from the calendar.
Paid Through:	Shows the paid through (last paid up date) of the customer assigned to this unit. Changing this date will cause Storage Commander to re-calculate the customer late status the next time end of day is run. This may result in additional late fees to be applied to the customer account.
Next Billing:	This shows the next time Storage Commander will assess rent to this unit. Unless End Of Day has not been run, this date will always be in the future. If this date is moved back in time Storage Commander will re-asses rent one billing cycle each time EOD is run until the Next Billing date is moved one billing cycle into the future.
Scheduled Move Out:	If a Scheduled Move Out has been entered for the customer, the date of the scheduled move out will be shown here. <i>Note: Using the Calendar will also show Scheduled Move Outs.</i>
Late Status:	Shows the current late status of the unit as determined by the customers Paid Through date. <i>Note: changing the late status without making an appropriate change to the paid through date will cause the customers late status to be re-evaluated on the next EOD, which may result in additional late fees being applied to the account.</i>
Walk Through:	Shows the current walk through order of the unit. Changing the Walk Through number will cause the unit to change its order in the Walk Through report.
Pay On Day:	Only used with anniversary billing plans. Storage Commander uses the calendar day that is entered in this field as the day it will asses rent to this unit, regardless of the day indicated in the Next Billing date.
Overlocked:	Clicking on Overlocked places a check mark in the check box and sends a lockout command to the gate security system for this unit. If a check mark is in the check box, clicking on it will remove the check mark and send an unlock command to the gate security system.
No Late Charges:	Placing a check mark in No Late Charges will prevent this unit/customer from ever entering or being charged for a late step.
Notes:	Clicking on the Notes button bar allows notes about the unit to be entered into the system. Unit notes are unit specific and will remain with the unit regardless of the customer currently occupying the unit.
Explanation of Changes:	Enter an explanation of whatever changes have been made here. Note; Storage Commander can be set-up to require an explanation of any changes before the changes can take effect.

3.10 CHARGING A FEE

This screen will allow you to charge a fee to a unit at any time without taking a payment.

To use it, go to **Activities | Charge A Fee** and select the unit you would like to charge a fee to. Click **Next** and it will take you to the screen on the right. Select the fee you would like to apply to this account from the **Fees** drop down list and click **Finish**.

3.11 OTHER INCOME

This screen will allow you to take payments on inactive customers as well as items like soft drinks. Go to **Activities | Other Income** to get to the following screen:

Here you will select whether or not it is for a customer.

If it is for a customer, click on the **Select** button to bring up the customer list and choose the customer.

Enter the amount of the income. If it is a payment on an inactive account, enter the appropriate amounts into the rent, fees, etc.

If it is something else, enter the amount into the **Other** field.

The **Description** field will activate and you can enter the description of what you are receiving income for.

Click **Next** and it will take you to the standard payment screen where you can select what form of payment you received.

3.12 LINKING UNITS

Linking units in Storage Commander has never been easier. Go to **Maintenance | Program Setup | Link Unit** to bring up the following screen:

Highlight the unit that will be the primary unit and click on **Select**. This will move that unit into the **Primary Unit** field.

To pick a new primary unit, click the **Clear** button and the unit will be moved back into the list.

Highlight the unit/units you would like to link to it, and click on **Add**.

Additional list box shows all units the will be linked to the **Primary Unit**. To remove a unit from the list of units to be linked, highlight it and click on the **<<Remove** button.

When you have completed selecting the units you would like to link together, simply click on the **Link Units** button.

Selecting multiple units during a move in will also cause all selected units to be linked together.

Special Note: Customer, Alt customer & Employer data of the unit/s that have been added to the Additional list box will be overwritten with the data from the Primary unit.

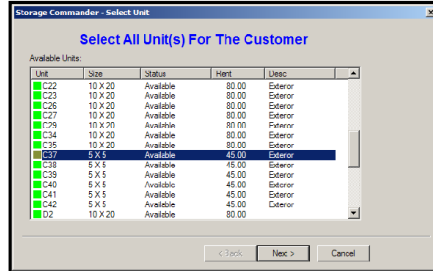
3.13 UNLINKING UNITS

To unlink units and re-assign them to individual customers, follow the steps listed below:

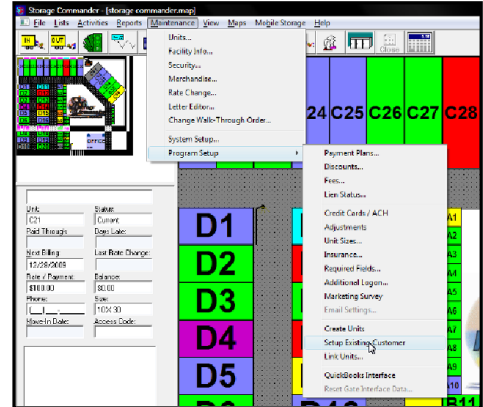
1. From the **Maintenance** pull down menu, select **Units**
2. Select the unit to be unlinked form the **Unit Number** drop down edit field.
3. Write down the **Paid Through** date, **Next Billing** date, **Move-In date**, and all cash balances such as **Deposit**, **Rent**, **Fees**, **Insurance**, **Tax** etc... that have been posted to the account.
4. Next change the **Available Status** field from **Rented** to **Available**.
5. If you have set Storage Commander to require an explanation of any changes, enter the explanation in the **Explanation of Changes** note box and click on the **Save** and **Done** buttons. At this point, the unit is

now un-linked from the master account.

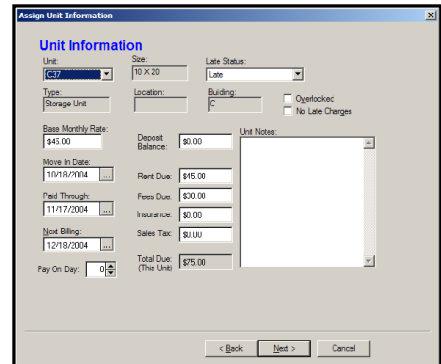
6. To complete the re-assignment of this storage unit go to the **Maintenance > Program Setup > Setup Existing Customer** drop down menu.
7. Select the unit that you just un-linked and made available. Click on the **Next** button to proceed to the next step.



8. The **Setup Billing Info** dialog box should now visible. Verify the **Payment Plan** and change if necessary. If the customer was receiving any recurring discounts or being charged any recurring fees, they should be displayed in the Fee / Discounts list box. Also, if a one time fee and/or discount needs to be added to the account you may select them by opening the Fee / Discount list box and selecting the appropriate fee or discount from the list. Click on the Next button to advance to the Unit Information section.



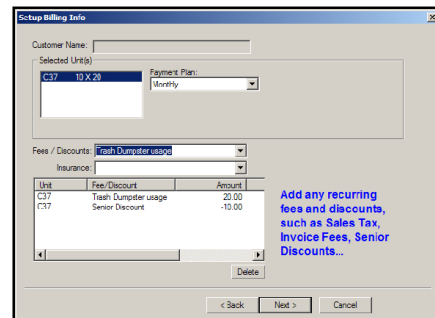
9. The Assign Unit Information screen is where you will enter the **Paid Through** date, **Next Billing** date, **Move-In date**, and all cash balances such as **Deposit**, **Rent**, **Fees**, **Insurance**, & **Tax** balances that you recorded in step 3. You should also verify that the **Late** and **Overlocked** status are correct. If you have configured Storage Commander to require an explanation for any changes, you must enter the explanation in the Unit Notes note box. Click on the **Next** button to proceed to the **Customer Information** screen.



10. In the Customer Information screen, enter the customer's name, address and any other information as needed. Click on the next button to proceed through the Alternate and Employer information screens to record additional information as needed.

11. The **Notes** screen is the final screen in the un-linking process. This is where you can enter any notes or alerts pertaining to the unlink process that you have just completed.

12. Repeat the above process if you have other units that need to be unlinked.



4 Fingerprint Scanner Option

4.1 FINGERPRINT SCANNER

Fingerprint scanning provides an entirely new level of security for self storage owners, management staff and their customers. It also provides a level of convenience currently unmatched in the self storage industry.

With the implementation of fingerprint scanning within Storage Commander, locating a customer's account is as simple as placing their finger on the scanner, Storage Commander automatically verifies the fingerprint with the fingerprint on file and locates the customers account. From the customer account, payments can be made, financial adjustments can be processed or the customers personnel data can be verified or changed.

Site managers can easily log into Storage Commander through the fingerprint scanner. Since the login process is quick and easy, Storage Commander can be configured to require login for specific functions, such as:

- | | |
|-----------------------|-------------------------|
| -Move-In | -Transfers |
| -Move Out | -Returned Checks |
| -Payments | -Change a Units Billing |
| -Adjustments | -Charge a Fee |
| -Reverse Transactions | -Other Income |

Requiring managers to login to for the above transaction types insures that each management transaction is recorded to the manager responsible for the transaction.

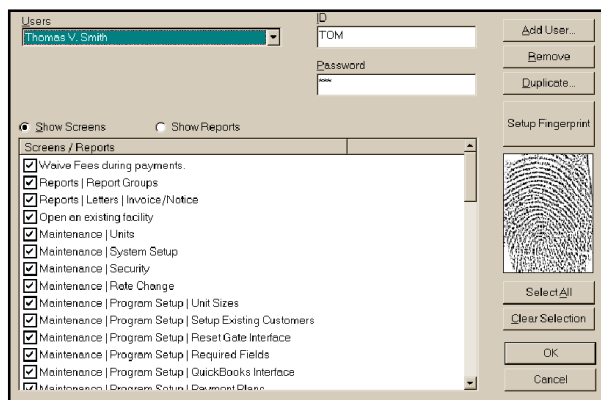
4.1.1 INSTALLING THE FINGERPRINT SCANNER OPTION

Storage Commander version 4.3.9d or newer is required in order to use the fingerprint scanner option. If you are running an older version of Storage Commander please contact our sales department to obtain an update.

Insert the fingerprint option CD into the CD drive. If your drive is configured to auto detect a new CD insertion, the instillation process will start automatically. Click on the **"OK"** button to install the fingerprint scanning option. If the instillation disk does not start automatically, use Windows Explorer to navigate to the CD ROM drive containing the fingerprint scanning installation program. Click on **"SETUP"** to initiate the installation of the fingerprint scanning option.

4.1.2 REGISTERING MANAGERS FINGERPRINTS

To record a managers fingerprint go to the **Maintenance | Security** pull down menu option. Enter the new managers name, id & password or select an existing manager from the **"Users"** pull down list box..



When the user has been selected, click on the “**Setup Fingerprint**” button. When the “**Setup Fingerprint**” dialog box appears click on the “**Start Registration**” button to start the scanning process. Four scans of the same finger must be made in order to register the fingerprint.



Please note: We recommend using the index finger or thumb for identification.

After a fingerprint has been registered, a message box will appear requesting that you click on the **OK** button to complete the scanning portion of the registration process. Select one of the four fingerprint pictures that will be used in USER/MANAGER SECURITY screen by clicking on the radio button under the fingerprint picture. Click on **OK** to complete the registration process.

Each time Storage Commander requires a login, the manager simply places their finger on the scanner to complete the login process.

4.1.3 REGISTERING CUSTOMER FINGERPRINTS

Please note that the same finger must be used during the registration process and that more than one person can have their fingerprint added to the account during the move-in process. The alternate or any additional people whom the tenet authorizes can have their fingerprints added to the tenets account during the move-in process, or at a latter date. Also note that individuals can be removed from the customers account at any time.

REGISTERING FINGERPRINTS DURING MOVE-IN

After completing the CUSTOMER INFORMATION and PHOTO screens, Storage Commander will display the fingerprint screen. To add a fingerprint, click on the **Add Fingerprint** button, enter the name of the person you will be taking the fingerprint from and click on the **OK** button or click on the **Cancel** button to return to the fingerprint screen without entering a name.

After a name has been entered and the OK button has been clicked, the “**Setup Fingerprint**” screen will be displayed. Click on the “**Start Registration**” button and wait until the “**Place your finger on the sensor**” message is displayed. At this point, the customer will need to place the finger that will be used during the registration process and for accessing the customers account on the sensor pad. A total of four scans will be needed to register the fingerprint to the account. If, during the fingerprint registration process one of the scans is unreadable, an error message “**FINGERPRINT NOT ACCEPTED, PLEASE TRY AGAIN.**” will be displayed. Click on the “**OK**” button to restart the fingerprint registration scans again.

Repeat this for each person whose fingerprint is to be registered to this account.

REGISTERING FINGERPRINTS TO AN EXISTING ACCOUNT

Locate the customer that you will be adding a fingerprint to. Once the customer has been located, click on the “**Details**” tab to enter the “UNIT/CUSTOMER INFORMATION” screen. Select the “**Fingerprint**” tab to enter the fingerprint screen. If the customer has existing fingerprints on file they will be listed in the “**Fingerprints on file**” list box along with a picture of their fingerprint. To add a new fingerprint to the customers account, click on the “**Add Fingerprint**” button to start the fingerprint registration process.

DELETING FINGERPRINTS FROM A CUSTOMERS ACCOUNT

To remove a fingerprint from a customer’s account, locate the customer and click on the “**Details**” button or tab to

enter the “UNIT/CUSTOMER INFORMATION” screen. Select the “**Fingerprint**” tab to enter the fingerprint screen. In the “**Fingerprints on file**” list box, locate the fingerprint to be removed and click on the “**Delete**” button to remove the fingerprint from the customer’s account.

4.1.4 USING THE FINGERPRINT SCANNER

Site Managers:

Whenever Storage Commander displays the login screen, place the finger that was used during the registration process on the sensor pad. If the scanner detects a match, the manager will be logged in. If a match is not found a message “**Fingerprint Not Recognized**” will be displayed. Click on the “**OK**” button to clear the message and try again. If you are still not able to login via the fingerprint scanner, manually type in your password and id to login and go to the **MAINTENANCE | SECURITY** screen. Locate your name in the “**User**” list box to verify that you have a fingerprint on file. If you do not have a fingerprint on file or if the fingerprint is not working, click on the “**Setup Fingerprint**” button to register a new fingerprint.

Customers:

Locating a customer’s account to make a payment, adjustment, move-out, or to just review the customer’s account can be accomplished quickly and accurately using the fingerprint scanner.

To use the fingerprint scanner all the manager has to do is click on the “**Scan Finger**” button when making a payment, adjusting an account, moving a customer out, transferring a customer, or locating a customers account while in the customer list screen. When the “**Get Fingerprint**” screen is displayed, ask the customer to place their finger on the sensor pad. If the fingerprint scanner finds a match, the requested action will be initiated. If the scanner does not find a match, the message “**Unable to find customer fingerprint**” will be displayed; if this happens, ask the customer to use the same finger that was used during the fingerprint registration process and try again.


**** Fingerprint scanner tips:**

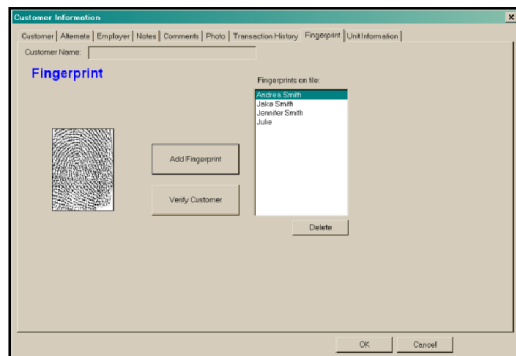
To ensure best results- Please hold finger down on scanner for 2-3 seconds.

When cleaning scanner, use a piece of scotch tape to remove any grease or dirt build up. **Do not use any form of liquid cleaners** as this may cause damage to scanner membrane.

4.1.5 VERIFYING FINGERPRINTS

The Storage Commander fingerprint scanner option allows the manager to quickly verify all fingerprints that have been registered to a customers account.

To verify a fingerprint, go to the customer list either by clicking the customer button  in the tool bar or by selecting “**Customers**” from the “**List**” pull down menu. When the customer list is displayed, locate the customer that requires fingerprint verification and click on the “**Details**” button to access the “**Customer Information**” screen. Click on the “**Fingerprint**” tab located along the top of the customer information screen, this will open the Fingerprint display screen. In the “**Fingerprints on file**” list box, click on the name of the person requiring





fingerprint verification. With the person’s name highlighted, click on the “**Verify Customer**” button and ask the person to place their finger on the sensor pad. If the fingerprint matches with the fingerprint on file, a message “**Fingerprint Matched**” will be displayed. If a match is not found, a “**Fingerprint Does Not Match**” message will be displayed. If you are unable to obtain a match of the persons fingerprint, verify that the correct person is

highlighted in the “FINGERPRINTS ON FILE.” If the person you are attempting to verify fingerprints on is highlighted, ask them to make sure they are using the same finger that was used during the registration process. If they cannot remember which finger was used, repeat the verification process until a match is found. Continuing to receive a no match message indicates that there are no fingerprints on file for that person.

4.1.6 CUSTOMER DETAIL REPORT

The Customer Detail report has been updated to include the drivers license & fingerprint pictures.

Main Street Storage				Customer Detail			
1900 Main Street Lone Pine, CA 93385-							
Personal Information							
Name: Smith, Julie Address: 29080 Box Springs Rd Perris, CA 99383-8888 Phone: (909) 838-3882 Fax: (909) 873-8323				Status: Active SSN: 685-82-8828 Drivers Lic: A9393828 Expires: 2000			
Employer Information							
Employer: MGM Studios Address: 7417 Vine Street Hollywood, CA 90211- Phone: (213) 339-3939 Fax: E-mail: juliesmith@madcom.com				Alternate: Johnson, Samuel Address: 10203 Dandy Dancer Way Hollywood, CA 90211- Phone: (213) 034-9393 Fax: (213) 949-3939			
Access Code: 124476		Timezone: 2		Keypad: 1		Auto Pay: False	
Notes: 2/30/05 Julie called to ask if we had a larger storage unit. I told her that she was in the largest unit we have but if she needed more storage space we have several more 10x20 units available, in fact we have a unit right next to hers that we could rent or reserve for her today. Julie told me that she would try to drop by in the next couple of days to rent the unit. 3/15/05 Julie called to tell me that she will be out of country for at least two months, and asked if she could pay her rent through the internet. I told her that we do offer that service and that all she would have to do is log on to our web site and enter her unit number and id, and then enter her credit card number or use the card that we have on file.							
Fingerprint:		Photo:					
							
Financial Information							
Unit	Paid Through	Rent	Fees	Tax	Insur	Other	Total
D 12	3/26/2005	\$180.00	\$45.00	\$0.00	\$0.00	\$0.00	\$205.00
D 13	4/25/2005	\$80.00	\$25.00	\$0.00	\$0.00	\$0.00	\$105.00
		\$240.00	\$70.00	\$0.00	\$0.00	\$0.00	\$310.00
Comments							
Date	Time	User ID	Comments				
05/03/2005	21:17	TOM	Called Julie's office to see if they could get word to her that we have not received any pay and that if she does not bring her account current she could lose her property.				
5/12/2005 4:20:56PM Version: 4.3.9d User ID: TOM							

5 Creating & Editing Notices

Any of the notices used in the Storage Commander system can be automatically generated using Crystal Reports (*Crystal Reports offers a quick and easy way to produce notices, but lacks the ability to customize the notice*), or if you prefer a more customized notice, you can use Microsoft Word 2010 or newer to create a totally customized notice utilizing merge fields to bring in customer and unit specific information into the notice. In addition to notices, you can also create.

5.1 CREATING NOTICES USING MICROSOFT WORD

Microsoft Word offers a high degree of customization to any of the documents used in Storage Commander. For example, using Word you can design a custom late notice that includes your logo and font styles. Within the body of the late notice, you insert merge fields that instruct Storage Commander on where to insert customer and facility/unit specific information, such as; customer names, addresses, unit number, rent due, fees due and when the rent must be paid. After you have completed the design of the document you can save it as a master template.

Merge fields are markers placed in the document that will be replaced with the field data connected to the marker. For example, a merge field such as “{fac name}” will be replaced with the facility name, {rent balance} would be replaced with the customer current rent balance, {late fee step01} would be replaced with the amount that would be charged for the first late step. The list of all merge codes can be found in the back of this manual.

If Storage Commander will be run within a network, each workstation that will have access to Storage Commander must also have Microsoft Word 2010 or newer installed on that workstation. It is also recommended if running Storage Commander in a network environment to save all Word based notices and contracts to a central location that all workstation have access to so that all workstation use the same documents.

5.1.1 USING MERGE FIELDS

As you write the document you can insert merge codes wherever specific information contained in the Storage Commander database needs to be displayed. The list of merge codes that are available to the document type you are designing are available in the back of this manual. All merge codes must start and end with the curly bracket {}, for example; the merge code for inserting the rental rate of the storage unit being rented would be {rate}. The dollar amount of the units rental rate will replace the merge code ({rate}) wherever this merge code is placed within the document.

Remember that you can use all of the formatting controls available in Microsoft Word. There are however restrictions on certain formatting controls supported in Word these restrictions are limited to: Word Tables, Frames and Text Box. Although you are free to use these formatting controls within the document itself, they cannot contain merge codes.

An example of a Word document using merge codes is shown on the next page

For detailed information on assigning Word documents within Storage Commander, refer to section 1.25 Setup Microsoft Word Notices & Documents discussed earlier in this manual.

Sample Word Document (items in RED indicating merge fields)

{fac name1}

{fac address1}

{fac city}, {fac state} {fac zip}

{fac phone1}

Late Notice

{last}, {first} {middle}

{address1} {address2}

{city}, {state} {zip}

{date}

Unit: {unit} Previous Balance \${prev bal}

Due Date: {paid thru} Fee: \${fee}

Rental Rate: \${rate} Total Due This Unit: \${unit balance}

Dear {first} {last}:

On {paid thru} rent was due on unit {unit}. Per your rental agreement, you have been charged a \${fee} late fee. Please pay the \${unit balance} balance due immediately to avoid further charges and loss of access to the unit. If you have already sent the payment in thank you; however, you are still responsible for the late fee. Please include the \${fee} late fee with your next payment.

If you have any questions please give us a call.

Sincerely,

{fac manager}

Manager

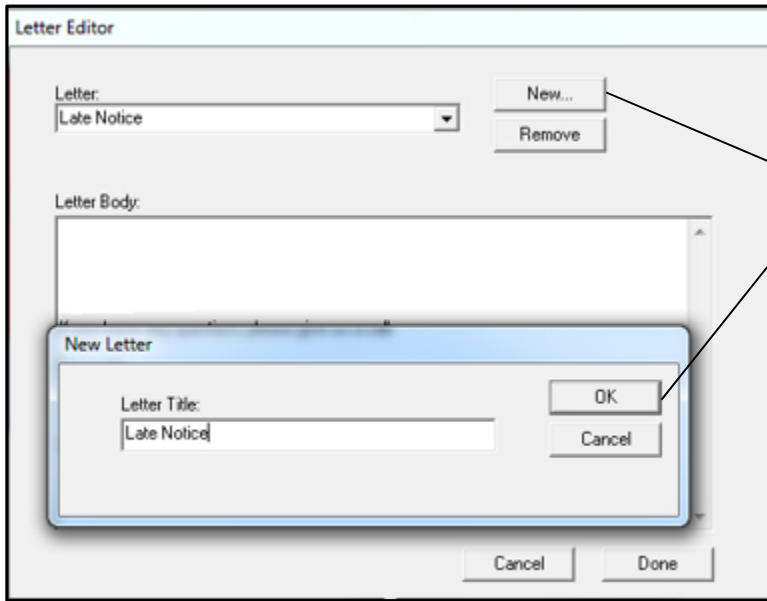
5.2 CREATING NOTICES USING STORAGE COMMANDER'S LETTER EDITOR

Storage Commander contains standardized notices and other documents that have been pre configured to pull specific customer and account data into the notice. Although you have complete control over the content of the letter used in each notice, you cannot change or add customer or account information.

5.2.1 CREATING A NEW NOTICE

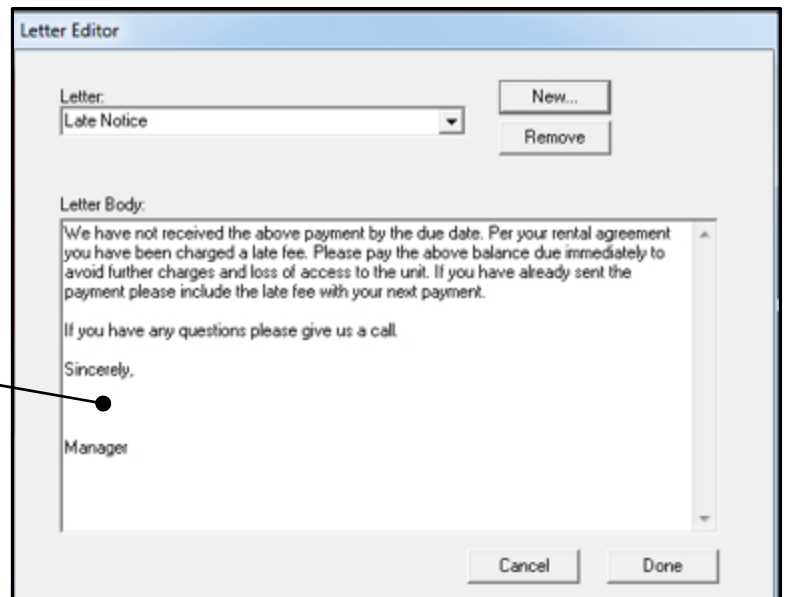
To create a new notice using the Storage Commander letter editor, click on **Maintenance**|**Letter Editor** and click on the **New** button. Enter the name of the notice and click on **OK**.

After the name of the notice has been entered, start typing in the text of the notice. Remember the text will appear in the **Letter Body** section of the notice



Click on the **New** button, enter a name for the notice and click on **OK**

Enter the text for the notice



Main Street Storage
1900 Main Street
Lone Pine, CA 93385-
(909) 672-6257

Late Notice

Dave Downey
38388 Gatewood Street
Perris, CA 99033-

July 08, 2002

Unit: C28

Past Due:	\$80.00
Rent Due:	80.00
Tax Due:	\$0.00
Fees Due:	5.00
Total Due:	\$165.00

Due Date: 07/24/2002

Dear Dave Downey:

We have not received the above payment by the due date. Per your rental agreement you have been charged a late fee. Please pay the above balance due immediately to avoid further charges and loss of access to the unit. If you have already sent the payment please include the late fee with your next payment.

If you have any questions please give us a call.

Sincerely,

Manager

Address Section
Not configurable by user.

Customer / Unit data
Not configurable by user.

Letter body
May be modified by user.

5.3 SET UP EXISTING CUSTOMERS

Set-Up Existing Customers is a highly automated function, which was designed to allow the user to quickly move in customers during the initial setup of Storage Commander.

In order to take advantage of the automated functions, payment plans (*see section 1.4*), discount plans (*see section 1.5*), fee schedules (*see section 1.6*) and late status (*see section 1.7*) must have been previously set up within Storage Commander.

To add existing customers (ones that are currently renting units at the time you are setting up your facility in Storage Commander), select the **Maintenance|Program Setup|Setup Existing Customer** menu to display the following dialog:

Unit	Size	Status	Rent	Desc
A2	5 x 5	Available	45.00	Exterior
A3	5 x 5	Available	45.00	Exterior
A4	5 x 5	Available	45.00	Exterior
A5	5 x 5	Available	45.00	Exterior
A6	5 x 5	Available	45.00	Exterior
A7	5 x 5	Available	45.00	Exterior
A8	5 x 5	Available	45.00	Exterior
A9	5 x 5	Available	45.00	Exterior
B11	5 x 10	Available	65.00	Exterior
B12	5 x 10	Available	65.00	Exterior
B13	5 x 10	Available	65.00	Exterior
B14	5 x 10	Available	65.00	Exterior
B15	5 x 10	Available	65.00	Exterior
B16	5 x 10	Available	65.00	Exterior

Using the left mouse button, click on the unit the existing customer is currently renting. *Note: If the customer is occupying more than one unit, hold the **Ctrl** key down while selecting the customers multiple units.*

When you have selected all of the units currently occupied by the customer, click on the **Next** button to proceed to the Setup Billing Info screen.

Unit	Fees/Discount	Amount
R20	Standard Package \$2,500	0.00

Select the payment plan that will be used for this customer.

Select any recurring fees and/or discounts that will be automatically assessed to this account each billing period. (Such as insurance or sales tax).

*Note that the **Customer** field will be blank at this stage; you will add the customer information later.*

Click on the **Next** button to proceed to the **Assign Unit Information** Window:

First verify that the unit number and rental rate are correct.

Enter the original move in date.

Enter the last **Paid Through** date of the customer.

Enter the **Move In Date**.

The day of the Paid Through date must be at least *one day earlier* than the day of the Move In date.

(For example: If the Move-In date is 03/12/99 then the paid through date should be set to xx/11/xx).

*Note that the **Next Billing** date and **Late Status** are automatically entered by the system. Storage Commander will automatically assign the **Late** and **Overlocked** Status in accordance with the parameters you entered in the Set-Up Late Status section.*

If this customer is not to be assessed late fees even if the unit goes into a late status, place a check mark in the “**No Late Charges**.”

Next enter the current balances, if any, for deposit, rent, fees, insurance & sales tax. Keeping in mind that if the

customers current months rent is now due, it should be included in the rent balance.

The **Pay On Day** is only used if the customer is on an anniversary payment plan and is used to enter the day of the month the customer is to charged rent.

If this customer has multiple storage units, use the **Unit** box to select and set the values for each unit, prior to proceeding to the next screen.

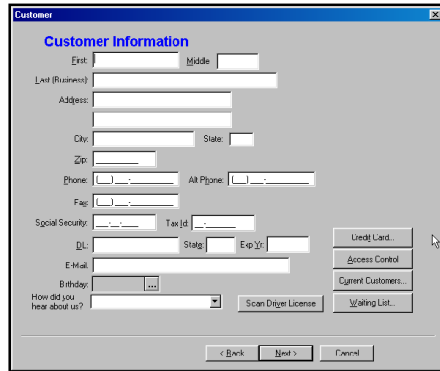
*NOTE: The **Next Billing** date represents the next time Storage Commander will access a rental charge to this unit. Even for past due customers, the next payment date must be equal to or greater than today's date.*

It is important to enter the customer's rent, fees and deposit balances as they currently apply to the customer's account. If the data is entered incorrectly, Storage Commander will carry the incorrect balances forward requiring you to make adjustments to the customer's account to rectify the errors.

Click on the **Next** button to continue on to the **Customer Information** screen:

5.4 CUSTOMER INFO

Enter the information for the customer into the appropriate text field boxes. Use the **Tab** key to move forward from field to field of the combination of **Shift Tab** to move backwards field by field.

The screenshot shows a software window titled "Customer" with a sub-header "Customer Information". It contains various text input fields for personal and business information, including First, Middle, Last (Business), Address, City, State, Zip, Phone, Alt Phone, Fax, Social Security, Tax Id, DL, State, Exp Yr, E-Mail, Birthday, and a dropdown for "How did you hear about us?". There are also buttons for "Link Unit", "Access Control", "Current Customers...", "Waiting List...", and "Scan Driver License". Navigation buttons at the bottom are "< Back", "Next >", and "Cancel".

Fill in as much information as you have time for, you can always return to the Customer Information screen to add data at a later time.

Click on the **Credit Card** button to store the customer's credit card information.

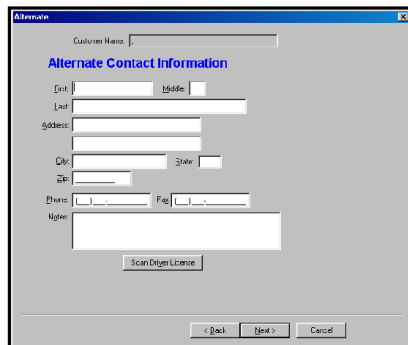
Clicking on the **Access Control** button allows you to enter the customer's gate code into Storage Commander.

If you would like to link the unit to a customer who has already been entered into Storage Commander, click on **Current Customers...** and select the customer from the list

If you have customers in the waiting list, click on the **Waiting List** button and select the customer from the list.

5.4.1 ALTERNATE CONTACT

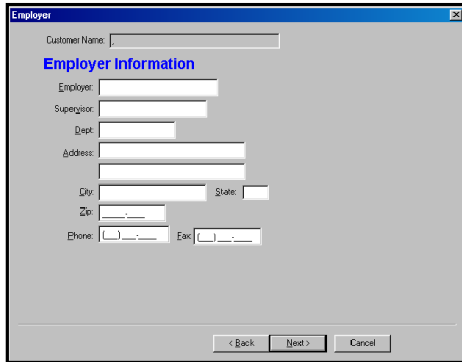
Enter the information for an alternate contact if appropriate. Typically the alternate contact will also receive lien and pre-lien letters (if selected in Lien Status set-up).

The screenshot shows a software window titled "Alternate" with a sub-header "Alternate Contact Information". It contains text input fields for Customer Name, First, Middle, Last, Address, City, State, Zip, Phone, Fax, and a large text area for "Notes". There is a "Scan Driver License" button. Navigation buttons at the bottom are "< Back", "Next >", and "Cancel".

Click the **Next** button to continue on to Employer Information dialog:

5.4.2 EMPLOYER INFORMATION

Enter the customer's employer information.

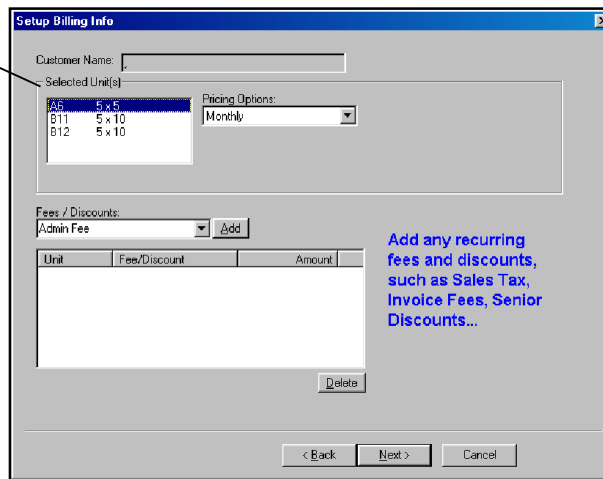


The **Employer** dialog box contains the following fields:

- Customer Name: [Text Box]
- Employer Information** (Section Header)
- Employer: [Text Box]
- Supervisor: [Text Box]
- Dept: [Text Box]
- Address: [Text Box]
- City: [Text Box] State: [Text Box]
- Zip: [Text Box]
- Phone: [Text Box] Fax: [Text Box]

Buttons at the bottom: < Back, Next >, Cancel.

All units that have been selected for this customer will be listed in the "Select Unit(s)" list box.



The **Setup Billing Info** dialog box contains the following fields:

- Customer Name: [Text Box]
- Select Unit(s): [List Box]

A6	5 x 5
B11	5 x 10
B12	5 x 10
- Pricing Options: [Dropdown Menu] (Currently set to Monthly)
- Fees / Discounts: [Text Box] (Currently set to Admin Fee) [Add]

Unit	Fee/Discount	Amount
- Delete [Button]

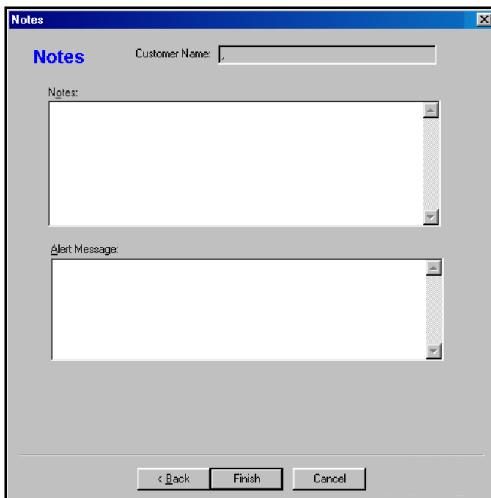
Text on the right: **Add any recurring fees and discounts, such as Sales Tax, Invoice Fees, Senior Discounts...**

Buttons at the bottom: < Back, Next >, Cancel.

Click the Next button to continue.

5.4.3 CUSTOMER NOTES

Notes that have been entered into the **Customer Notes** box will be displayed in the unit information section of the site-map and will also be added into the collection worksheet.



The **Notes** dialog box contains the following fields:

- Customer Name: [Text Box]
- Notes: [Text Area]
- Alert Message: [Text Area]

Buttons at the bottom: < Back, Finish, Cancel.

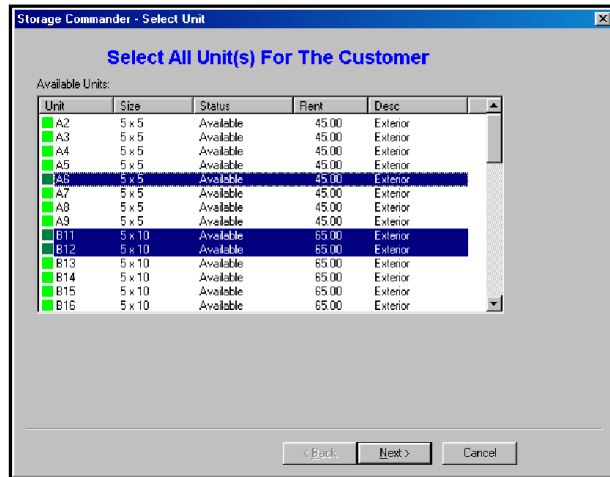
The **Notes** dialog box is split into two sections: notes where general notes about the customer, such as the names of individuals who have been given permission to have access to the customers unit. The other type are notes detailing conversations made while attempting to collect past due rent (*all notes that are entered into the Notes box will appear in the collections worksheet*).

Alert Messages can also be added to a customers account. Once an alert message has been attached to a customer account any transaction activity such as payments move out, will cause the alert message to be displayed.

After entering a note click the **Finish** button to add the customer and associated unit information to the database.

5.4.4 ASSIGNING MULTIPLE UNITS TO A SINGLE CUSTOMER

To link two or more units to a single customer during set-up of existing customers:



From the **Select Unit** setup window, highlight all of the units the customer has rented by holding down the **Ctrl** key and clicking on each unit. When all units have been highlighted, click on the **Next** button to proceed to the **Billing Info** setup window.

When the **Billing Info** window is displayed you will note that all of the units that were assigned to this customer will be listed in the **Selected Unit(s)** list box. Click on each unit to set its individual payment plan, reoccurring fee and/or discount.

6 Reports

6.1 OVERVIEW

The Storage Commander reporting mechanism is designed to be compatible with a wide array of printers. It also provides print-preview capability for on-demand reports and automatic printing of reports that can be pre-selected to print at fixed times (such as end of day, week, month, quarter or year) as part of the end of day processing.

An editing capability is also provided to enable you to modify the text of the letters and/or notices that are sent to customers.

6.2 SELECTING REPORTS

Click on the **Reports** pull-down menu to see a list of reports organized by report type. Click on a report type to open another list of reports covering that report type. Click on an individual report to open the report.

6.3 ENTERING DATE RANGES

Many reports take a from-date and a to-date to allow you to limit the data that goes into a report. There are several preset date ranges in the date range window. If you want the report to only involve today's data, then simply click on **Today**. If you would like dates that are not preset, select **Other**; here you can decide which days to report. To report a single day, make sure the **From** and **To** dates are the same. The date range data entry dialogs default to the same date for from- and to-dates. Dates can be entered into the date range fields either by typing in the date or by clicking on the ellipsis (...) button and using the on-screen calendar to choose the date. When you click on the ellipsis, the screen to the right appears, allowing you to click on the date you would like to select.

6.4 GRAY BARS

Many reports include alternating gray-shaded bars on the data rows to allow you to distinguish the data from one row to the next.

Sample Storage			Active Customer Status			
123 Main St. Anywhere, CA 12345						
Name	Unit	Paid Through	Deposit Balance	Unit Balance	Phone	Status
ABBOTT, JASON D	307	01/31/2003	\$ 10.00	\$ -	(504) 942-0004	
ANDERSON, WILLIAM	1217	12/31/2002	10.00	49.00	(540) 802-4655	Lock Out
BACA, ROBERT	202	12/31/2002	10.00	68.00	(540) 947-5194	Lock Out
BAGGETT, KARLA	007	02/28/2003	10.00	(22.05)	(540) 298-0727	
BALL, CYNTHIA	008	01/31/2003	10.00	-	(540) 990-3688	
Ballenger, Greg	315	01/31/2003	10.00	-	(540) 992-4330	
Barber, Pamela	610	07/31/2002	10.00	389.00	(540) 297-0291	Sale

6.5 PREVIEW

Most reports that you select from the **Reports** menu are displayed initially in a preview window. You can use the preview window to scan through the report, print it, save it to a file or cancel without printing. An example of a report preview is shown above.


The preview window is a standard window and can be shrunk, enlarged, or moved about the desktop like other windows in other programs. You can click and drag on any edge or the title bar, and can click the minimize, maximize, and go-away buttons in the top right corner of each window. You can also have multiple report windows open at the same time.

The report preview window has a toolbar at the top that you can use to view and print the report. The left portion of the toolbar contains arrow controls to allow you to view the various pages of multi-page reports. Clicking on the zoom field (represented by the 100% default zoom level) allows you to change the zoom level of the report in the



preview window; it does not change the size of the printed report.

Click on the printer icon button to print the report. It will bring up the standard Windows print dialog shown below. You can also use this to print selected pages of a multi-page report as well as the number of copies.

To close the preview window, click on the Close  button on the tool bar..

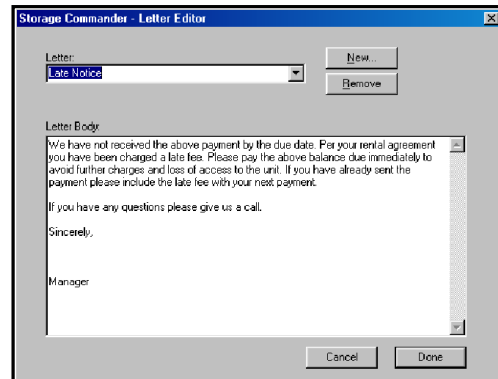
6.6 EDITING NOTICES & LETTERS

There are several letters that are automatically printed by the program at the end of certain transactions such as: receipts, late notices, lien notices, returned checks, invoices, rent adjustments and partial payments. The format of the report is fixed to support standard Number 9 dual-window envelopes; however, the text of the body of the report can be easily edited by you.

To edit the body text, select the **Maintenance|Letter Editor** menu to display the following dialog:

Select the letter that you want to edit by clicking the arrow in the **Letter** field at the top of the dialog and then clicking on the letter's title. Click in the **Letter Body** text edit area to position the cursor at the place you want to begin editing. Type in the text changes and then click the **Done** button or select a different letter to edit. Editing is similar to other Windows editing operations; you can insert, delete, and use cut-and-paste editing.

Note that the signatory line is also considered part of the letter body.

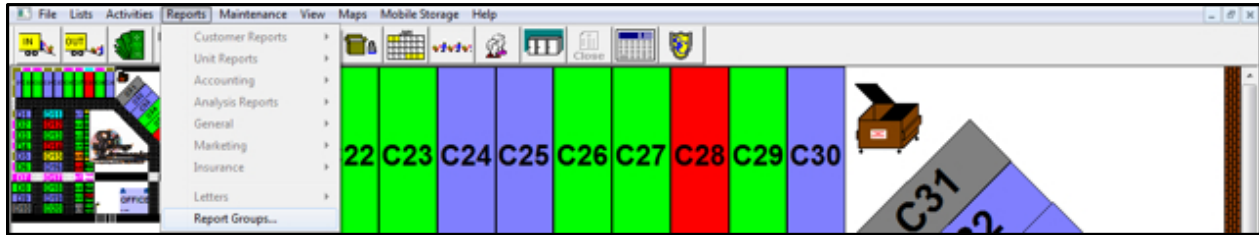


6.7 REPORT GROUPS

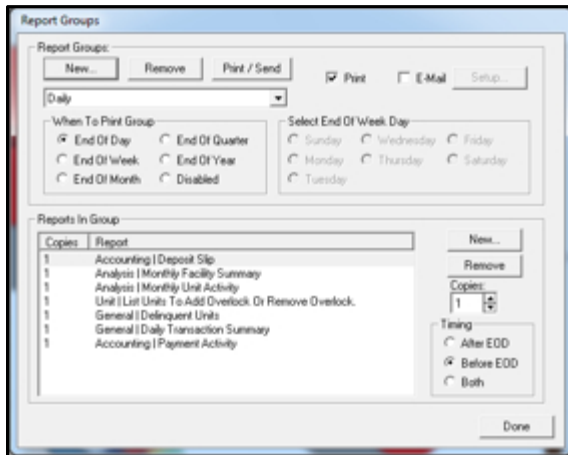
Reports can be selected within Storage Commander to print or email as a function of End of Day to cover pre-selected date ranges such as: end of day, end of week, end of month, end of quarter or end of year. When a report group is created to cover a certain date range (such as End of Month), Storage Commander will automatically print all reports contained in the Report Group at the pre-selected time (in this case, at the end of the month). In addition, Storage Commander will automatically set the date range for all of the reports in the group to match the report group type which will adjust the reports to include all activity during the last month.

6.7.1 CREATING A REPORT GROUP

From the **Reports** pull down menu click on **Report Groups**



This will bring up the Storage Commander Report Groups window, as shown below:

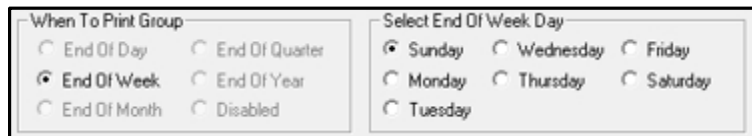


This window is divided into two basic sections: **1) Report Groups** and **2) Reports In Group**.

To add a report group to Storage Commander, click on the **New...** button in the Report Groups section and the following window will appear. Give the report group a name. Click on the **OK** button to save the name and take you to the next step. You can click on **Cancel** to return to the Storage Commander Report Groups window.

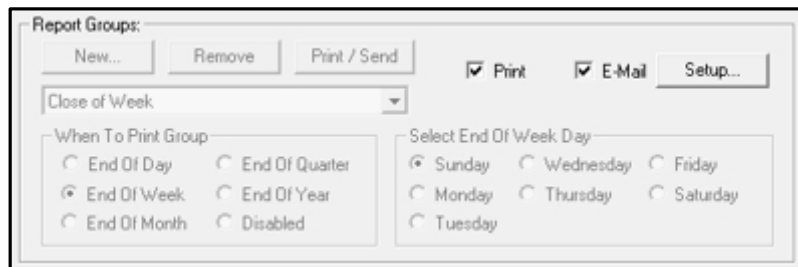
Next click on a selection within the **When To Print Group** section. This will determine when Storage Commander will print the group during the End Of Day operation.

If the End of Week selection was selected, as shown below, you must tell Storage Commander what day of the week constitutes your end of week. Select the end of week day by clicking on the appropriate day in the **Select End Of Week Day** selection area. Storage Commander will automatically set the date range for the reports to coincide with the **When To Print Group** selection.



Now select how you want Storage Commander to generate the reports. You can either have them printed, emailed, or both by selecting the appropriate checkbox.

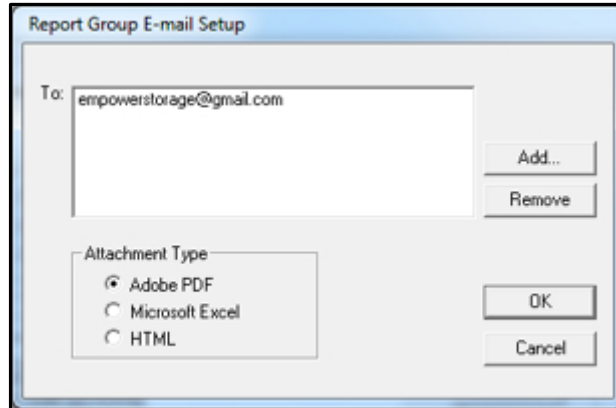
If you select email, you will need to click the **Setup...** button to enter the email address you want the reports sent to. If you do not have any emails entered yet a screen will open prompting you for an email address.



Once you click **OK**, or if you already have email addresses entered, the main setup screen will appear. Click **Add...** for each additional email address you wish to have the reports sent to.

If you need to take an email out of the list, highlight the email address and click **Remove**.

Down below, select the file format you want the reports to be in when they are attached to the emails.

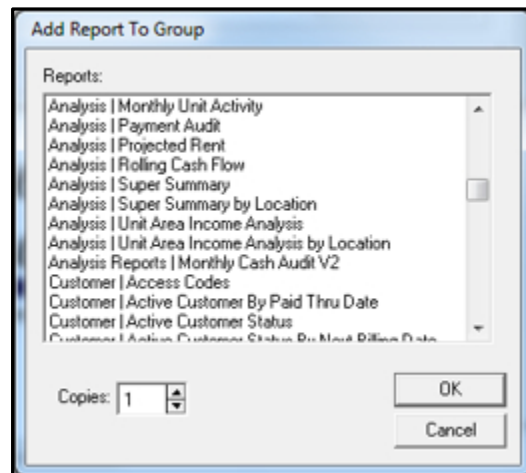


Once you have entered all the addresses you are going to be sending the reports in this group to, click **OK** and you will return to the main Report Groups screen.

Once the report group is created, you need to fill the group with reports. To add a report to the group, click **New...** in the Reports In Group section and the following list will appear:

This list displays all reports in the system, grouped by report type for instance; **Analysis** reports, **Customer** reports, **Unit** reports. Grouping the reports in this manner allows easier identification of report content as well as locating report when looking for a report based on a certain content requirement.

Highlight the report you want to add to the group. Then, select the number of copies that you want to have printed during the End Of Day processing. Click **OK** and the report will be added to the list on the main Report Groups screen at the bottom.



Once the report is added, select whether you want the report to be generated before, after or both before and after the automated functions of End Of Day processing have been run. This selection is called Timing and is located in the bottom right corner of the main Report Groups screen; it must be selected for each report added. The default on this selection is before end of day processing.

Once you have entered all of the reports for this group, you can click **Done** in the Report Groups screen to return to the main Storage Commander screen.

7 Getting Help

To view the Storage Commander manual, click on the Help pull down menu item and select View Manual. This will display an on-screen version of the users manual.

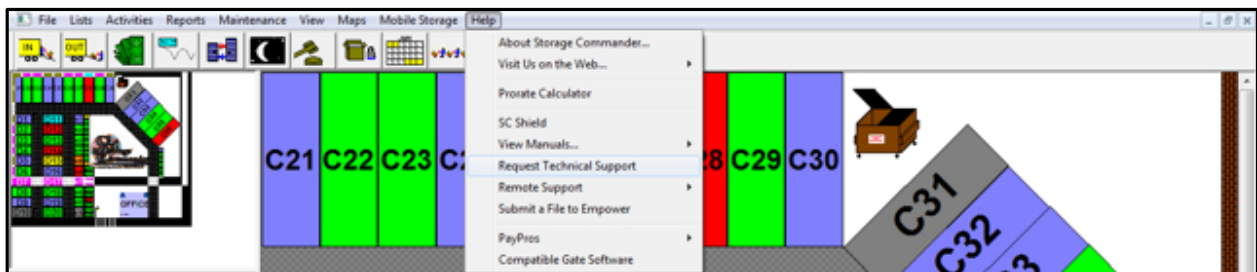
Use the controls located on the top of the screen to move forward and backward through the manual and to control the zoom factor.



To view the manual, Acrobat Reader must be installed. To install Acrobat Reader, place the Storage Commander installation CD into the CD ROM drive and select Adobe's Acrobat Reader from the installation screen.

7.1 TECHNICAL SUPPORT

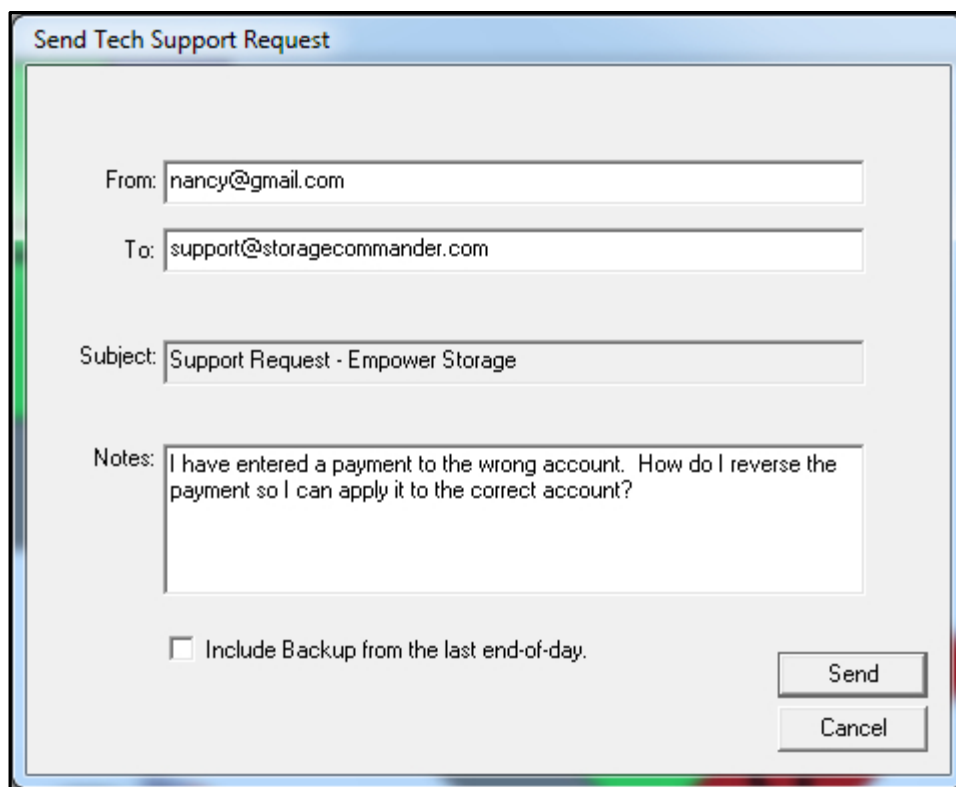
Technical Support has become easier, too. Now you can make a technical support request, or a map change request, and include a backup at the same time.



Go to **Help | Request Technical Support** and fill in the automated request.

If you have already entered your facility email address, then it will automatically fill itself in. The support address will also come up automatically.

Just fill in the **Notes** section with a brief description of the issue you want support on, select the checkbox to include the backup, and click the **Send** button.



The image shows a Windows-style dialog box titled "Send Tech Support Request". It contains several input fields and a checkbox. The "From:" field is pre-filled with "nancy@gmail.com". The "To:" field is pre-filled with "support@storagecommander.com". The "Subject:" field is pre-filled with "Support Request - Empower Storage". The "Notes:" field contains the text "I have entered a payment to the wrong account. How do I reverse the payment so I can apply it to the correct account?". Below the notes field is a checkbox labeled "Include Backup from the last end-of-day." which is currently unchecked. At the bottom right of the dialog are two buttons: "Send" and "Cancel".

Send Tech Support Request

From: nancy@gmail.com

To: support@storagecommander.com

Subject: Support Request - Empower Storage

Notes: I have entered a payment to the wrong account. How do I reverse the payment so I can apply it to the correct account?

☐ Include Backup from the last end-of-day.

Send

Cancel

8 Computer System Specifications

The computer system you will be using for your self storage facility will depend on specific system components being available to not only run your management software (Storage Commander) but to also run other ancillary software and hardware such as: gate security hardware & software, credit card processing hardware & software, id camera hardware & software, chances are that you may not use all of these devices at you storage facility but you will probably use some of them. If you are thinking about purchasing a new computer or would like to know if your existing computer is capable of handling the job, please review the computer specification below, this specification covers all of the configuration requirements needed to provide you with a computer fully capable to run your storage facility.

Computer System Recommendations

Operating System:	Microsoft Windows XP, Windows 7, Windows 8 32bit or 64bit.
CPU (Computer Processor)	Minimum 2 ghz Pentium, or equivalent AMD processor
GPU (Graphics Processor)	1-2 gb GDDR memory, NVIDIA or AMD graphic processor.
20" LCD Monitor	
Computer Memory	Minimum 2gb
Hard Drive	3gb free hard disk space.
High speed internet	Recommended if internet options will be installed (Net Commander, On-Line Payment, On-Line Reservations, SC Payment).
USB ports	Required for optional hardware (Multi-Function CC & Check reader, Photo ID, Finger Print Scanner, Bar Code Scanner, Receipt Printer)
Serial ports	Required by some gate security systems
CD/DVD drive	
High duty cycle printer	Laser Printer is recommended
Microsoft Word 2010	(Only required if using Word based notices)

Storage Commander

General Merge Codes

Facility Information Fields

{fac name1}	Name Line 1
{fac name2}	Name Line 2
{fac address1}	Address Line 1
{fac address2}	Address Line 2
{fac city}	City
{fac state}	State
{fac zip}	Zip
{fac phone1}	Phone 1
{fac phone2}	Phone 2
{fac fax}	Fax Phone
{fac manager}	Manager
{fac email}	E-Mail Address

Unit Information Fields

{unit}	Unit Number
{size}	Unit Size
{rate}	Unit Rate
{unit description}	Unit description
{building}	Building
{unit type}	Type
{unit location}	Location
{pay type}	Payment Plan
{square feet}	Square Feet
{unit balance}	Unit Balance
{rent balance}	Rent Due
{fees balance}	Fees Due
{insur balance}	Insurance Due
{other balance}	Merchandise
{tax balance}	Rent Sales Tax
{depos balance}	Deposit Balance
{paid thru}	Paid Through
{next bill}	Next Billing
{move in}	Move In Date
{move out}	Vacate Date
{revert}	Rate will revert
{last rate change}	Last Rate Change
{pay on day}	Rent due date
{next pay date}	Paid Thru + 1 day
{auction date}	Auction Date
{auction fee}	Auction Fee
{payment amount}	Burdened Payment
{recurring discount}	Discount Amount
{discounted rent}	Rent Less Discounts
{recurring fees}	Fees Amount
{recurring taxes}	Tax Amount
{recurring insur}	Insurance Amount
{lastpaydate}	Last Payment Date
{lastpay\$}	Last Payment Amount
{days late}	Days Late

Customer Information Fields

{movein date}	Move In Date
{movein time}	Move In Time
{first}	First Name
{middle}	Middle Name
{last}	Last Name
{address1}	Address Line 1
{address2}	Address Line 2
{city}	City Name
{state}	State
{zip}	Zip Code
{tax id}	Tax Id
{home phone}	Phone Number
{work phone}	Employer Phone
{dl number}	Driver License Number
{dl state}	Driver License State
{dl date}	Driver License Exp
{email}	E-Mail Address
{ssn}	Social Security Number
{cust balance}	Customer Balance

Alternate Customer Fields

{alt first}	First Name
{alt middle}	Middle Name
{alt last}	Last Name
{alt address1}	Address Line 1
{alt address2}	Address Line 2
{alt city}	City
{alt state}	State
{alt zip}	Zip Code
{alt phone}	Phone
{alt fax}	Fax

Employer Information

{employer}	Employer
{emp dept}	Department
{emp phone}	Phone
{emp fax}	Fax
{emp super}	Supervisor
{emp address1}	Address Line 1
{emp address2}	Address Line 2
{emp city}	Employer City
{emp state}	Employer State
{emp zip}	Employer Zip

Credit Card Fields

{cc type}	Card Type
{cc acct}	Account Number
{cc bill addr}	Bill Address
{cc bill zip}	Bill Zip
{cc name}	Card Name
{cc amount}	Card Amount
{cc expire}	Expiration Date

Gate Access Fields

{access code}	Access Code
{keypad}	Keypad Number
{timezone}	Time Zone
{start time}	Start Time

Customer Notes

{notes}	Customer Notes
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Dates & Date Formats

{date}	Current Date
{time}	Current Time
{date short weekday name}	Wed
{date full weekday name}	Wednesday
{date short month name}	Jan
{date full month name}	January
{date day of the month}	2
{date month}	01
{date month no zero}	1
{date short year}	13
{date long year}	2013

Time Formats

example 4:21 PM PST

{time hour 24}	1600
{time hour 24 no zero}	16
{time hour 12}	04
{time hour 12 no zero}	4
{time minute}	21
{time second}	50
{time ampm}	PM

Time Zone

based on computers time zone

{timezone}	Pacific Daylight Time
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Logged In Manager

Username logged into Storage Commander

{current user}	Admin
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Insert the following field names into your Word documents where you want the values to be replaced by Storage Commander. Field names (shown in blue) must be entered in lower case and match exactly, with the { } brackets preceding and ending each entry.

Specialty Merge Codes

Financial Information

{deposit}..... Deposit
 {due date}..... Due Date
 {prev bal}..... Previous Balance
 {fee}..... Fee
 {total due}..... Total Due
 {total rent}..... Total Rent
 {end time}..... End Time
 {total discount}..... Total Discount
 {total tax}..... Total Tax
 {total fees}..... Total fees
 {total merchandise}..... Total Merchandise
 {total insurance}..... Total Insurance
 {merch amount}..... Merchandise Amount
 {merch tax}..... Merchandise Tax
 {due day}..... Rent Due Day
 {nsf fee}..... NSF Charge
 {prorated rent}..... Prorated Rent Charge
 {reservation depos}..... Reservation Deposit

Late Fees

{late fee step01}..... Step 1 Fee
 {late fee step02}..... Step 2 Fee
 {late fee step03}..... Step 3 Fee
 {late fee step04}..... Step 4 Fee
 {late fee step05}..... Step 5 Fee
 {late fee step06}..... Step 6 Fee
 {late fee step07}..... Step 7 Fee
 {late fee step08}..... Step 8 Fee
 {late fee step09}..... Step 9 Fee
 {late fee step10}..... Step 10 Fee

Late Days

{late days step01}..... Step 1 Days
 {late days step02}..... Step 2 Days
 {late days step03}..... Step 3 Days
 {late days step04}..... Step 4 Days
 {late days step05}..... Step 5 Days
 {late days step06}..... Step 6 Days
 {late days step07}..... Step 7 Days
 {late days step08}..... Step 8 Days
 {late days step09}..... Step 9 Days
 {late days step10}..... Step 10 days

Contract Numbering

{contract number}..... Contract Number

Invoice

{next rent}..... Next rent amount
 {next discount}..... Next discount
 {next fees}..... Next fee amount
 {next tax}..... Next rent tax amount
 {next insurance}..... Next rental insurance amount
 {next pay amount}..... Next payment amount
 {inv number}..... Invoice Number

Rate Change

{effect date}..... Effective date
 {old rate}..... Old rate
 {new rate}..... New rate

Returned Check

{check number}..... Check number
 {check amount}..... Check amount
 {nsf charge}..... NSF fee
 {check date}..... Check date
 {bank number}..... Bank id number

Late Notices

{pref bal}..... Customer fee balance
 {fee}..... Late fee being assessed

Flex Dates

{flex date 1}..... Add x days to 1st flex date
 {flex date 2}..... Add x days to 2nd flex date
 {flex date 3}..... Add x days to 3rd flex date
 {flex date 4}..... Add x days to 4th flex date

Auction Notice

{auction date}..... Auction date
 {auction fee}..... Auction fee

Receipt

{receipt transaction}..... Transaction (receipt) number
 (Auto incrementing)
 {receipt group}..... **Group id, no data is replaced.**
 {receipt trans}..... Payment type
 (Cash, Check or Credit Card)
 {receipt unit}..... Unit number payment is applied to
 {receipt item}..... Account payment is being posted to
 {receipt amount}..... Payment amount
 {receipt pt}..... Paid through date after payment.
 {receipt balance}..... Account balance after payment

Move In & Transfer Contracts**Receipt****Invoice Notice****Rate Change Notice****Returned Check Notice****Late Notice****Auction Notice**

Specialty merge codes can only be used in certain types of notices. For example all of the merge codes listed in the Yellow box (Move-In & Transfer Contracts) can only be used in Move-In contracts and Transfer contracts and will not work with any other type of contract or notice. All of the merge codes listed in the General merge codes section can be used with any contract or notice at any time.

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